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ABSTRACT

This handbook is for anyone interested in developing a community educational outreach program. It was prepared as part of a project concerned with teaching personal and family finance. Its content, however, is general enough in nature to apply to any type of education project. An introduction presents information on the development of the handbook, and the next four chapters discuss the developmental process of a community-based educational program. This developmental process contains five phases: (1) community and clientele analysis (needs assessment); (2) objective setting; (3) program design; (4) program implementation; and (5) program evaluation. Concrete examples of programs illustrate many of the concepts presented, such as utilizing community resources and working with advisory committees. Samples of various forms and charts are also included. (BM)

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PLANNING AND MANAGING COMMUNITY PROGRAMS

A Process Approach

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Table of Contents

	Page
Acknowledgements	v
Introduction	1
Chapter 1 — NEEDS ASSESSMENT AND OBJECTIVE SETTING	9
Chapter 2 — PROJECT PLANNING AND DEVELOPMENT	29
Chapter 3 — PROJECT IMPLEMENTATION (Action)	51
Chapter 4 — EVALUATION	79
References	111

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Denise M. Matejic

Introduction

Community-based educational programs are the concern of many Extension and other professionals. Emphasis is increasingly being placed upon in-depth and economical planning, implementation, and evaluation of such programs, thus increasing their quality and consequently the impact on consumers in the community.

Extension and other community professionals need to be very specific in their objectives. They must know what resources are needed at what time, and from what sources these resources are available. They should be aware of the management aspect of program planning when involved not only in the teaching, but also in the planning, implementation, and evaluation of such projects or programs.

Designing, implementing, and evaluating educational efforts in the community needs innovative thinking, planning, and foresight. Programs are not developed in a vacuum; they need the involvement of people to make them work. This manual is based upon the experience derived from a project involving a cadre of people: professionals, student interns, and advisory committee members who so generously gave of their time to the project.

The project, "Helping Families Adjust to Economic Change," was a federally funded project conducted by the Cooperative Extension Service of Cook College, Rutgers University, in Sayreville, New Brunswick, and Perth Amboy, New Jersey, from 1976-79. The project involved one full-time and three part-time professionals, and part-time graduate and undergraduate students. The work that was done included the design, implementation, and administration of an educational outreach program in family financial management, and the development of educational materials on the consumer and professional levels. A report regarding this project is available upon request at a small cost. Inquiries should be addressed to Denise M. Matejic, Department of Home Economics, P.O. Box 231, Cook College, Rutgers University, New Brunswick, New Jersey 08903.

Personal experience cannot be the only component of a manual such as this. One also applies knowledge gained from other academic endeavors, as well as from professionals in the field, either through their books, discussions with them, or in-service education programs

or lectures. Therefore, the thoughts expressed here include all of the above. The authors' viewpoints should not be taken as mandate, but are intended to stimulate further thinking on the part of the reader. It is in this context that the reader should understand the recommendations made by the authors. It also needs to be noted that what worked in one county in one state might not be entirely applicable to another region without appropriate adaptation.

Similar to most educational efforts, community-based educational programs are open systems. The boundaries of such programs tend to be not well defined. Their effectiveness depends on their capacity in making timely adjustments to the changing needs of the communities in which they serve (Banathy, 1973).

The developmental process of a community-based educational program is influenced by the complexity of the program. Five phases have been found to be essential in developing a viable program: (1) community and clientele analysis, (2) objective setting, (3) program design, (4) program implementation, and (5) program evaluation.

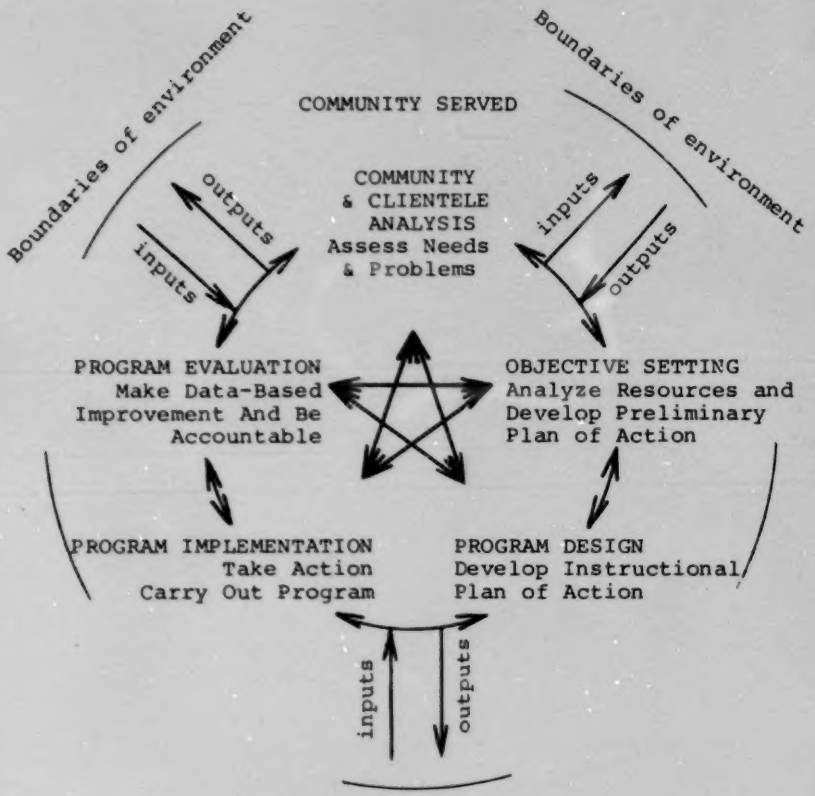
Although there seems to be a logical sequence in implementing the aforementioned phases, program initiators/developers often find that the steps are interdependent. Decisions and actions taken on one step/phase most likely will have an influence on the others. For example, although "community and clientele analysis" seems to be a logical beginning step, we have found that objectives often need to be set in order to delineate a parameter within which community and clientele analysis can be properly focused. Otherwise human as well as material resources may be utilized unproductively. Furthermore, decisions with regard to "objective setting" have direct influence on any one of the other three steps/phases, namely program design, implementation, and evaluation.

This interdependency among the five phases demands a perceptive program initiator/director who is capable of viewing each program decision from the standpoint of the entire project. A creative program director, therefore, needs to be able to think and work with project staff from various perspectives. Individual staff members must cooperatively deliberate, develop strategies, and implement program decisions with regard to each of the five steps/phases under the leadership of the director from start to finish.

Program development can be divided into several phases. Diagram A will enable you to visualize a systematic approach to program development and provides

DIAGRAM A

THE INTERRELATIONSHIPS BETWEEN COMMUNITY-BASED EDUCATIONAL PROGRAM DEVELOPMENT PHASES



a vivid illustration of the complex interrelationships between the five phases. A short discussion follows to provide a point of clarification on each phase.

The five strategic phases in program development* include (see chart on preceding page):

1. Analyzing the community and clientele, which means assessing the needs of people and analyzing their problems. Be sure you have identified problems which can be dealt with within the resources of your organization.

   You will need data about:

   --people in the community.
   --society in general (national trends, issues, etc.).
   --your organization so that you can establish program limits.

2. Analyzing available resources and setting realistic goals and objectives. This involves looking at present programs conducted in the community (by your organization as well as other agencies) so that no duplication will result.

   It involves analyzing your available resources of time, energy, and money, and bringing them in line with what you want to achieve.

   You need to specify what the desired outcome is of what you are planning to do, and then set objectives which will help you reach this desired outcome.

   The next step is to put the objectives in a logical sequence to reach your goal. Remain flexible, and check yourself to see if the goals are really obtainable (e.g., is it reasonable to assume that the action you suggest people take will really be taken) and meaningful to the majority of people you intend to serve.

*Overall concept based on and adapted from Figure 1, The Extension Teaching or Program Development Cycle, Chapter II, "Evaluation in Extension Education," by J. Neil Raudabaugh in the U.S.D.A. publication, Evaluation in Extension, Division of Extension Research and Training, Federal Extension Service. Additional input from several Cooperative Extension in-service programs conducted in New Jersey. (See also reference page.)

3. Designing a program and developing an instructional plan of action. The subject matter of your teaching needs to be delineated and defined. Lessons need to be outlined, resources selected, and an instructional plan of action developed.

   Ask yourself what needs to be discussed, what information participants must have and in what sequence, and how participants will be involved and made to feel responsible for their own learning. Look into the various methods of teaching, e.g., mass media, meetings, through mail, workshops, one-to-one basis, direct teaching, through other resources, etc.

   Ask yourself what materials will be needed to accomplish your goals and who will prepare them. Study teaching aids available and see which ones would be appropriate and affordable.

   This manual uses the topic of financial management as its program focus. Refer to Personal and Family Finances--A Resource Guide For Teaching for detailed coverage of this topic. Other topics of community education could be used in your program development work.

4. Implementing the program. Now you need to set your instructional methods in an order of priority according to resources available, time limitations, and/or other constraints. Some of the tasks included in this phase are organizing yourself, getting space, developing a time schedule and working calendar, and implementing your teaching in community buildings, via radio, in classrooms, homes, etc. In short, carry out your plan of action.

5. Evaluating the program. Your programs are successful when you can show that your plan of action has allowed your goals to be achieved. This can be done through proper evaluation. Controls need to be set up at intervals to monitor the progress of your program. It is important to plan your evaluation within each of the program phases, and to make it an integral part of your program. This may require additional human and financial resources, but it is well worth the effort.

   Areas to be evaluated can include:

   Input: Needs assessment done, how you came about designing the program, who was involved in planning, etc.

Process and Output: Your implementation, methods used, how well done, how appropriate for your clientele, etc.

Product: What was developed during the project (educational materials, home-study course, handbook, etc.), materials used.

Impact: Behavioral changes accomplished: what have participants learned, become aware of, or done to improve their own situation because of your teaching.

Sometimes only an impact evaluation might be warranted, as in the case of ongoing programs where individuals undergo strict performance evaluation on a yearly or bi-yearly basis and programs are planned and objectives chosen ahead of time on a yearly basis. This planning is part of the structure of the organization and involves grass roots participation by learners.

At other times an overall project evaluation will be needed (e.g., when conducting a special project). This type of accountability will carry benefits for the entire project and for future programs of other educators who can base their activities on your reported results.

A type of evaluation increasingly in demand, but difficult to accomplish, is an analysis of programs on a cost-benefit basis. This means that various teaching methods would be analyzed as to time and money expended against the results desired. Decisions as to which methods offer the greatest cost benefit would contribute to future program planning.

Based on the evaluation (however informal), you should see if changes in strategy need to be made such as setting new goals, modifying them or making no changes. This re-examination should be done for as long as the program or project is in force, and includes the teacher, administrator, evaluator, participant(s), member(s) of advisory committee, etc.

This introduction has been prepared to aid professional educators in the task of planning, implementing, and evaluating community outreach programs. Most of the information contained herein was developed and

gleaned from just such a program--"Helping Families Adjust to Economic Change," funded by the United States Department of Agriculture through the Co-operative Extension Service, Department of Home Economics, Cook College, Rutgers University. In short, the principles and suggestions presented in this manual have been tried and tested. They worked for the project team. We hope they will work for you.

Chapter 1:

NEEDS ASSESSMENT AND OBJECTIVE SETTING

GENERAL NEEDS ASSESSMENT

There is a general lack of awareness and knowledge of consumer concepts in today's marketplace. The many surveys done recently by research and survey firms document this abundantly.

The technology in the marketplace is complex and is becoming even more so. American consumers have more choices available to them than ever before. On the average, they are exposed to approximately 1600 advertisements a day, pulling them in various directions of thought and action.

Government regulations are becoming increasingly manifold as well as complicated. There is abundant consumer legislation available protecting the interested, knowledgeable, and motivated person. Yet many people, who could benefit from knowing about specific consumer rights and responsibilities in order to live a more meaningful life, are not aware of what is available and what laws exist to protect them.

Sociological factors influence the management of resources of individuals and families. Many different family life-styles are acceptable in today's society and practiced openly today. These include, in addition to the traditional nuclear family, the single career person--widow--divorced person; the couple without children; the couple with grown children; the "restructured" family (meaning the family where one or both spouses have previously been divorced, have remarried and now have small or grown children from either one or two different sets of parents); the single adult who chooses to adopt a child; and the single mother (or father), either single by choice or after death. Sociologists say that never in history have so many people lived through so many various life-styles at one time or another in their lives.

There is also a sociological upheaval of increased divorces and greater permissiveness, as well as flexibility in life-styles; a rise in the individualism of people in general; and a greater independence of women and children in particular, which is a decided change from the patriarchal society where the husband/father made most of the decisions.

All of the above points to an increased need for people of all ages, incomes, backgrounds, ethnicity or family structure to get the most out of their dollars and to make the effective management of their resources a lifetime affair.

COMMUNITY NEEDS ASSESSMENT

Consumer educators need to be more specific in their assessment of problems in the community. They should design and conduct a community needs assessment to better understand the people in the community. The areas of greatest concern should be pinpointed within the guidelines of general objectives of the school system, agency, or other organization sponsoring the project.

The Change Process and the Publics We Serve

Dr. E. J. Boone,* Professor and Head of Adult and Community College Education at North Carolina State University, recently said that as people's needs increase rapidly and economic circumstances change, educators will need to get increasingly involved in new programs (e.g., energy conservation), and will therefore need to sharpen their skills to identify target audiences and direct programs to them, instead of just to the general public. One way to accomplish this is through existing social groups in the community.

According to Dr. Boone, when working in the community through its leaders and with the existing power structure and groups, we need to think in terms of four concepts:

- Social stratification and social differentiation.
- Power (need for looking at informal leaders; these are the power figures who really make the decisions).

*Ackhowledgement goes to Dr. Boone whose in-service education programs for Home Economics Departments of the New Jersey Cooperative Extension Service have served as stimuli for the needs assessment portion of this manual. His thoughts were analyzed, carried through, and adapted for consumer educators in Extension outreach programs by D. Matejic.

- Culture.

- Interfacing (a new concept that arose around 1972), meaning the interaction between various sets of people of different backgrounds.

Mapping Out the Community

This means developing an area (county) situation statement which includes a demographic study of people living in the areas you are concerned with as well as developing a list of major employers and agencies. For some of the information, you might need the assistance of a demographer, the library, the planning board, etc. Other information can be obtained from county and resource guides; brainstorming with some of your identified community leaders and consumers might also bring good results.

Population Data: (personal characteristics you are looking for in your clientele):

income (low, high, middle)
education
employment (private, public)
age distribution of population
number of people in the area you will serve
race
ethnic background
number of households
housing; quality of housing
family structure

Data on Institutions in Your Community: Make a list of formal groups, institutions, etc., in your community which employ a certain number of people or are of a certain size, or which simply serve people in your community. For example:

industries (size, type, people employed, other characteristics)

agencies, schools, colleges

newspapers, radio stations, television stations

associations, clubs

financial institutions (banks, savings and loans, credit unions)

insurance companies, credit counselling services

retail establishments

religious institutions, organizations

labor unions

civic organizations (PTA, Lions Clubs, YWCA, tenants organizations)

consumer groups

As you develop your list, write down any unique characteristics about the population or institutions as they surface.

Analyze the informal power structure in the community with the help of some person(s) interested in benefitting the community; search for and identify informal leaders in the community. Make plans on how to interest them in your project by finding out who knows them and how you might approach them.

Assessing the Needs of Specific Target Audiences

Once you have done your demographic study, in which you identified your community and its people; its religious, civic, and political leaders; its industry; agencies; associations; and other formal institutions; the next step is to take all the data you have accumulated and determine your target audience(s) by setting priorities and identifying whom you need and want to serve the most.

The following checklist will help you accomplish this:

- Identify the major goals of the organization in which you work (e.g., university, school, agency).
  - Goal #1
  - Goal #2
  - Goal #3
- Identify and list major target groups your organization has a commitment to serve, then number them according to their priority (if applicable); e.g., youth, the elderly, minorities, women, the handicapped, etc.

- List the top three target audiences you just identified on the chart below. Now look back to your demographic study and take three groups which you feel need special attention as a result of this study and list them on the chart below as indicated.

CHART FOR LISTING TARGET AUDIENCES

Top priority target audiences of your organization	Top target audience as taken from outcome of demographic study
. _____	. _____
. _____	. _____
. _____	. _____

- Compare these two lists. Are there any groups which are the same in both columns? If so, it is an easy matter. If not, some setting of priorities will have to be done again and some compromise reached. Most likely, though, you will find that there is overlapping and that the target audiences which need your aid are the ones your organization (project, school) want to serve.

  Needless to say, this process will only be of help to you if you have some flexibility in choosing your target group. But even if you don't, chances are that such soul searching will increase your sensitivity to the needs of your community.

- Write down your final three choices of target audiences.*

*e.g., the aged; homemakers; preschoolers; professionals; low-income families; young adults; families; working wives; gainfully employed homemakers; mothers; single parents; middle-year families; husbands and wives; retired people; widows; people working in certain industry, business, or school system; other special interest groups (clubs); women re-entering the labor market; etc.

_____

_____

_____

- Note some characteristics of the three groups you want to reach. (e.g., age, family structure, ethnic background, education, recreation orientation, changing housing needs expected, care of elderly, reassessment of careers, education of children, physical change, adjustment and change in life-style, mental adjustment, re-education for employment, continuing education needs, nutrition and health, etc.) Use the table on the following page to list these characteristics for your three groups. A sample audience is given in the first column.

Additional <u>important</u> questions which might help you focus your program planning towards specific target audiences include:

- Where can these audiences be reached--where do they congregate? (home, church, school, job, supermarket, recreational facilities.)
- How can these audiences be reached? (through the mass media, newsletters, correspondence courses, school, etc.)
- Are they likely to attend classes?
- If your audiences do not attend classes, which functions do they attend that would make them accessible to your program offerings?
- How can your program offering be presented to generate the excitement necessary to get them to attend?

CONSUMER SPECIAL NEEDS ASSESSMENT

<u>Needs as Seen by Educator</u>

You have now delineated your target group and its characteristics. Now analyze and set priorities regarding its specific subject matter needs as you see them. For example:

CONSUMER SPECIAL NEEDS ASSESSMENT CHART

	Sample audience	Your target audience 1	Your target audience 2	Your target audience 3
Identify by Name:	Middle-years Family 35-55			
Characteristics, interests, needs in common	. Living and adjusting to change . Special nutrition needs . Financing children's education . Changing housing needs . Preparation for retirement . Children away from home, etc.			

- A young couple without children will need information on proper budgeting techniques and credit information to start life together on a positive note, both personally and financially.

- A widow with some funds left by her husband will need information on proper savings strategies to give her the greatest possible protection in the years to come.

- A middle-aged couple with children may have overextended themselves due to easy accessibility to credit and the use of credit by several family members. They will need a family spending plan and a workable system of money management for the entire family. They may also lack adequate savings to support education previously planned for their children and may be spending a high amount of income for transportation if there is more than one (or two) cars in the family.

- A family with limited financial resources might not have the management ability and resources to live the way it wants to live. The family's goals and aspirations might be unrealistic as far as needs and wants are concerned in relation to resources available. The family may also need basic skills to shop in the marketplace and knowledge regarding how to maximize all its resources: financial, human, and community.

- An individual or family with very low income might need help with survival skills regarding reading, operating in the community (including marketing), community resources available, and agencies providing services.

People have different interests and levels of knowledge. You need to pinpoint those interests and tailor your program to their needs.

Needs as Seen by Target Group

Frequently, consumer educators do not know the specific make-up of their audience or the people who registered for a program, especially if it was not targeted toward a specific group. In this case, find out about the interests and personal backgrounds of the people in the audience in order to determine their special needs as consumers.

The questionnaire on pages 20-23 is another example of assessing consumer needs and interests; it can be easily adapted to different subject matters. It will give you a valuable indication of the interests and needs of the group with which you are planning to work. Such a questionnaire might also be sent out to people on mailing lists that you have available, for instance, bank customers, utility bill recipients, etc. The questionnaire should include a return address and those returning it should be made aware of the functions of your program and should be invited to participate.

QUESTIONNAIRE*

NAME: _____

ADDRESS: _____

PHONE: _____

I. Male___ Female___

II. Marital Status:

Married ___ Single ___
Divorced, separated ___ Widowed ___

III. Age:

Your Age ___
Age of spouse ___
Ages of dependent children ___ ___ ___ ___

IV. Employment:

homemaker ___ working part time ___
working full time ___ unemployed ___

V. a) Your income range:

$3 - 5,999 per year ___
$6 - 8,999 per year ___
$9 -14,999 per year ___
over 15,000 per year ___

b) Your total family income range:

under $10,000 per year ___
between $10-14,999 per year ___
between $15-19,999 per year ___
over $20,000 per year ___

VI. Position:

secretary-clerk ___
professional ___
blue collar worker ___
(factory, etc.)
white collar worker___
(sales, etc.)
other ___

VII. Education:

High School Yes___ No___
College Yes___ No___
2 Years___
4 Years___
other _____

1. If married, who takes care of most financial matters? you ___ spouse ___ jointly ___

2. Do you feel you have a well-balanced overall financial plan or program, tailored to your individual needs? Yes ___ No ___

3. How often do you and your family openly discuss your financial program in a constructive way? Sometimes ___ Always ___ Never ___

4. Do you include your children in the planning sessions? Sometimes ___ Always ___ Never ___

Check any items that apply to you and share with us your personal concerns in each of the following management areas. If you have no concerns in a particular area, please state this.

Budgeting
__not enough income
__don't feel I manage well enough
__lack of communication within family
__no definite short-term goals
__no definite long-term goals

My concerns _____

_____

Credit
__could not get credit in my name
__am overextended
__don't understand contracts

My concerns _____

_____

Insurance

__don't understand different types
__don't have enough protection
__don't feel the plan is tailored to my needs
__don't know where to get reliable information

My concerns _____

_____

Savings

__have no family savings
__have no personal savings
__don't save regularly
__can't save enough
__have no savings plan for children's education

My concerns _____

_____

5. Do you and your family have more savings now than three years ago? Yes ___ No ___

Total family savings: Under $5,000___
Over $5,000___

Total personal savings: Under $5,000___
Over $5,000___

Investments

__have no family investments
__don't understand enough about this area to have made personal investments

My concerns _____

_____

Housing

__should I rent or buy
__need information on financing a home
__need guidelines on choosing a place to live

My concerns _____

_____

Wills

__I have no will
__will is not up to date

My concerns _____

_____

6. What do you feel is, or has been, your biggest problem in working out an effective personal financial plan? Please be as specific as you can in describing any problem you have.

_____

_____

*This questionnaire has been developed and used by Denise Matejic in surveying educational program needs on a regional basis in New Jersey within the regular program activities of Extension.

Needs Summarized

Based on the various project needs assessments identified so far, you are ready to develop a community program. An example, taken from the project "Helping Families Adjust to Economic Change," is given below:

> Needs were determined and the following agreement drawn up between the Cooperative Extension Service, Rutgers--The State University of New Jersey; and the Extension Service, USDA:
>
> PURPOSE: TO DEVELOP A PROGRAM TO HELP FAMILIES ADJUST TO ECONOMIC CHANGE AND IMPROVE THEIR LEVEL OF LIVING
>
> Whereas, there is a need to help families understand the effects of economic change upon their personal economic stability and security,
>
> Whereas, there is a need to help families determine economic goals consistent with their values and available resources,
>
> Whereas, there is a need for families to learn and use skills to control and manage money,
>
> Whereas, there is a need for families to determine debt limits and manage debt within those limits,
>
> Whereas, there is a need for families to adjust spending and credit use as economic and/or personal change occurs,
>
> Whereas, there is a need for families and individuals to increase knowledge and skills to extend, expand, and increase resources to increase their standard of living,
>
> Whereas, there is need for families to provide proper insurance protection at cost adequate to their circumstances,
>
> Whereas, there is a need for families and individuals to increase knowledge and skills necessary to extend, expand, and increase resources to improve their level of living,
>
> Both the Cooperator and the Service wish to help to determine the most desirable program to help families adjust to economic change and increase their level of living.

SETTING AND WRITING OF OBJECTIVES

You have analyzed your community and assessed the needs of your clientele. Next comes setting objectives and stating the desired outcome.

Program objectives must be set and these objectives must be put into a sequence that is logical and meaningful. By analyzing your list of objectives, you will remain cost-conscious throughout the process of designing and implementing your program. You will also be projecting what will happen in the project and what you expect will be accomplished. Make sure that your objectives can be measured, which means that indicators need to be developed to measure some of the following:*

- target audience identified (who is to be reached).
- how many people are expected to be reached (a very difficult projection to make in an adult education program, but an estimate would be worthwhile as it helps later when one controls and evaluates the project in its various phases).
- what will be accomplished.
- what will the learner have learned.
- what changes are expected in the learner.
- what beneficial action might be taken by the learner because of your program.

If one concept should be stressed again and again, it would be the following: DO NOT WRITE EDUCATIONAL OBJECTIVES in terms of <u>your</u> activities, but in terms of what you want learners to learn, understand, or do.

It does not really matter how much activity and "business" there is around a task, it matters what is produced. The consumer educator's goal is to produce an informed, knowledgeable, and interested consumer.

*More on this topic will be found in the chapter on "Evaluation."

Research shows that learning takes place in four steps:

1) becoming aware of and interested in the subject matter,

2) becoming knowledgeable about it,

3) internalizing the information, and

4) taking action (this is the last of the steps in learning).

As an example, you might state your objectives in the following manner:*

AWARENESS: The learners will become aware of the functions of credit bureaus and will be able to recognize those functions when given to them in a list. (Learning at recognition level.)

KNOWLEDGE: The learners will become knowledgeable about different types of life insurance and will be able to list the different types available. (Learning at recall level.)

KNOWLEDGE AND INTERNALIZING: The learners will re-examine their personal financial plan. (The learning begins to become meaningful to the learner.)

ACTION: The learners will become motivated to take financial inventory once a year or whenever appropriate to their personal situation. (The learning has become so meaningful that a behavioral pattern has been formed.)

The example given below will show you how objectives were set in the project "Helping Families Adjust to Economic Change" and might give you some ideas for writing your own.

*For more information on the topic of writing objectives, consult Robert F. Mager, Preparing Instructional Objectives, Fearon Publishers, 6 Davis Drive, Belmont, California, 94002.

Objectives of "Helping Families Adjust to Economic Change"

Individuals and families will:*

- --understand that personal economic competence is one of the major components in achieving the quality of life to which each individual aspires;
- --understand the effects of economic changes upon their personal economic stability and security, and learn how to adjust accordingly;
- --determine economic goals consistent with their values and available resources and take actions to achieve those goals;
- --learn and use skills to develop a personal money management plan recognizing that periodic revision is necessary due to changes in the life cycle;
- --understand the concept of consumer credit, its advantages, disadvantages, and wise use;
- --determine debt limits tailored to their own situation;
- --identify the different types of credit and methods of repayment;
- --understand contractual obligations and the consequences to the consumer if not fulfilled;
- --understand the functions of credit bureaus, the importance of a good credit rating, and the consumer's rights and responsibilities as far as credit reporting and credit files are concerned;
- --understand the various types of insurance policies available;

*It should be understood that not all objectives cited applied to all consumers reached through the project, nor was that an intended outcome; these objectives served as an overall framework for the diverse consumers reached.

--learn how an insurance protection program can be adapted to their personal needs and at cost commensurate with their income;

--understand the role savings and investments play in a family's overall financial well-being, and the benefits of saving regularly.

Chapter 2:

PROJECT PLANNING AND DEVELOPMENT

WHAT IS PROJECT PLANNING AND DEVELOPMENT?

Project planning and development must answer the questions of who, what, when, where, how, and why. The "who", and "why" questions should have been adequately answered through your needs assessment. This chapter will concentrate on finding answers to the questions of (in the order in which they appear in the chapter): WHAT, HOW, WHERE, WHEN. But first, a few words about the project approach in general.

DEFINITION AND CHARACTERISTICS OF A PROJECT

Project

A project is a designed program, functioning somewhat independently within the overall educational administrative guidelines of an existing structure; or as Melvin Silverman, author of Project Management (The Professional Development Program), John Wiley and Sons, says, "A project is an organization designed to accomplish a specific achievement. It is created from within a functioning parent organization and dissolved upon completion of that achievement."

The concept of project is being used in this chapter in the broadest sense of the word: from a separate entity to an integrated but still separate major task lasting for a limited period of time.

Project Management

Project management is the planning, directing, and supervising of a specific project. To quote Silverman, "project management is the direction and supervision of a project. It is typified by the use of specialized control techniques."

Characteristics of a Project

A project is limited in time of operation; starting and ending times are usually decided beforehand. It is limited in scope. The objectives and purpose are very clearly delineated; the budget is usually closely defined; the responsibilities are spelled out. The evaluation is usually built

in and is also very precise in its scope.

The team which works on a project will disperse after it is completed. Even while immersed in the planning and implementation of a most successful project, the project director, principal investigator, project leader, or other titled individual, has to think in terms of gradually phasing out the project.

It is established to achieve a specific purpose, and there is a certain flexibility involved in the management of a project which the regular ongoing program does not have.

The project director or manager is in charge of the entire project in terms of its management, administration, and supervision of his or her team of professionals, employees, extern and intern students, volunteers, etc. Administratively, the functional manager of the organization is in charge of personnel actions. Sometimes these roles are played by one person, depending on the organizational structure.

IMPORTANCE OF PROJECT MANAGEMENT IN EDUCATION

With financial resources becoming increasingly scarce in education and the persistence of problems, the creation of a special project coordinated by one person (perhaps using outside funding) can be very effective. It can zero in on one special task; it can come up with solutions in a relatively short period of time without the expenditure of tremendous amounts of money which would be necessary if a new program were instituted within the parent organization.

With the popularity of seeking outside funding from federal, state or private sources, the principles of project management should come in handy, as any funding agency will want an exact proposal submitted to it. This proposal usually includes a situation statement, needs assessment, a set of objectives, a plan of action, timetable, and a budget. The project will start and end at specified times. One person needs to be in charge of it and has to submit a detailed report at the end of the project. This person has broad responsibilities and duties and multiple coordinating functions to fulfill.

CHARACTERISTICS OF PROJECT MANAGEMENT VERSUS FUNCTIONAL MANAGEMENT

In the traditional functional management, each manager is in charge of his or her special function, i.e., sales, purchasing, personnel, field supervision. In project management, the project manager is a coordinator. He or she works across functional lines, i.e., he or she would have a function in sales, purchasing, personnel, promotion, and field supervision, to take an example from the business world.

In the federal project "Helping Families Adjust to Economic Change" supported through special needs funds by the USDA, the project director had the function of a purchasing agent or buyer, assisted in the hiring of the community coordinator, directed the overall project, was responsible for the budget, designed the project, and oversaw its implementation. The director also hired the project evaluator; oversaw the development of educational materials for consumers and professionals; and made sure that the final reports, evaluations, and all other elements of the contract were fulfilled. Being in charge of the budget, she had to see that the budget was monitored regularly and that the project team had enough resources to function properly. Then she had to coordinate internal and external relations--internal including the project staff and colleagues consisting of professionals, students, and secretaries; external including agencies, schools, civic clubs, and other people in the community. In addition, a very important part of the coordinating function included communication with superiors such as the department chairperson and the dean as well as the County Cooperative Extension Service professionals.

Many times within educational institutions there are not enough resources to hire a new functional manager or director, so a specialist is designated to conduct a special project.

In recent years, we have been hearing more about the management of specific projects in the field of education. Examples are an energy conservation project for the elderly, projects of the handicapped, a consumer education project for low-income families, nutrition projects for the elderly, etc. Federal and state government funding for special projects has been increasing; on the other hand, the traditional resources available to educational institutions are becoming more scarce. Experts predict that the number of temporarily funded projects will increase. These projects will have a specific scope and will start, be delivered, and evaluated on their completion.

As accountability of funds is emphasized, pressure will continue to be exerted on maximizing resources to achieve goals.

One reason for the project method is to try out something new, innovative, and daring; if it works and proves to be worthwhile, it will be included in the ongoing process and made a permanent addition to the organization.

The project approach is also used if the task confronted is very complex and needs a lot of coordination. As an example, we could cite the Extension Service's Northeast Extension Publications project, where one function of the project manager is to oversee the development, production, and dissemination of Extension consumer education publications from all the states in the Northeast.

The project method offers tremendous opportunities to experiment at relatively little cost. Educationally speaking, it is a great chance for an "intellectual entrepreneur" to be able to move into uncharted waters.

Experience gained through the federal project on which this manual is based shows that one of the very important tasks is that of communicating among project members on an ongoing basis. Difficulties can and most likely will occur regarding maximization of personnel efforts, because the goals, insights, and background of permanent staff, part-time professionals, para-professionals or interns, office workers and regular staff and administrators outside the project might be divergent.

Special effort needs to be made to clarify again and again the goals of the organization and the project: the strategies to be followed and benefits to be derived by consumers as well as the project team from the project. Similar communication should ideally be going on with administrators and professionals in regular programs to make them understand your goals and objectives.

One final thought: to operate most efficiently you need to have freedom to experiment, change strategies if necessary, and to make mistakes. Secure the complete trust and cooperation of your supervisor and strive for mutual understanding.

PROJECT DIRECTOR: RESPONSIBILITIES AND CHARACTERISTICS

- Plans what needs to be done and when; designs project, writes proposals, submits for funding.
- Administers and/or supervises the use of the funds.
- Hires, or assists functional manager in hiring, personnel (paid as well as volunteers); co-ordinates their activities; supervises them.
- Directs project (oversees all phases of project); if applicable, works on project alone with no team involved.
- Sees that resources are available for project activities and supplies what is needed.
- Coordinates evaluation or directs evaluation as applicable; monitors the project's progress.
- Plans and implements phase-out of the project; has interest of entire team at heart.
- Needs to be creative and innovative, have management background, be able to coordinate and delegate tasks, have human relations and motivational skills.

WHAT DETERMINES THE SUCCESS OF A PROJECT

Experience gained from the USDA-funded project indicate that the following factors determine the success of a project:

- A thorough and efficient planning process.
- Enough flexibility to be able to change strategy, if necessary.
- Starting the project on time.
- Completing the project within the stipulated time and within the stipulated budget.
- Monitoring the budget regularly to see if adjustments need to be made.
- Fulfilling the objectives as stated in the contract.

- Keeping communication lines (internally and externally) open to ensure cooperation and maximization of resources throughout the project.

- Conducting the evaluation on an ongoing basis throughout the project.

- Phasing out the project and disbanding the project team properly and with sensitivity.

DESIGN THE PROGRAM TO MEET THE NEEDS OF YOUR TARGET AUDIENCES: WHAT

Plan programs appropriate for your target audience, not for "the public in general," and you will be much more successful. After you have assessed the needs of the people you serve and analyzed them and their problems, as discussed earlier, you are now ready to design your program.

Identify specific subject matters appropriate for your target audience. (The questionnaire on page 20-23 might help you in doing this.) Creativity in adult education programming is of great importance. Many adults do not want to go back to the formal educational system which they left many years ago. In order to reach them, you need to be creative in what you present and how you present it. Consult the chart on "Possible Consumer Education Titles" on pages 56-57.

As a practical example of the program design of a community outreach program, we again cite the project "Helping Families Adjust to Economic Change." Its major objective was to reach and help families with information on budgeting, decision making, credit, insurance, saving, family communication, and general money management and to develop educational materials as necessary. Notice from the components identified below that this program was designed to meet the consumer needs of particular communities through a variety of procedures and activities:

Components of the Project

The outreach phase explored the use of a van at different times of the day and at different locations as one method to reach new audiences. New Brunswick, Sayreville, and Perth Amboy, with their different ethnic blends, were selected as sites.

The program also used community rooms and consumers' homes to hold classes in, and asked the support of community leaders, local agencies, and civic groups to help increase the outreach.

Another aspect of the community outreach phase was to contact consumers through their employers by offering classes in companies and firms. The program also benefited the employer, who is an integral part of the community, by generating better educated and adjusted consumers who are able to cope with the pressures of day-to-day expenses.

The development of educational materials for educators to help consumers solve their personal financial problems through proper decision making was another component of the project, as was the development of consumer fact sheets packaged as a home-study correspondence course.

The evaluation phase was conducted under the leadership of an outside evaluator. This phase also included the development of program indicators and proper evaluation instruments. This was an ongoing process, done with support and constant feedback from all of the professionals involved with the project.

The project has national implications; the final report, evaluation conclusions, recommendations for the future, and the materials developed are being distributed through all land grant universities to Extension educators and consumers. The findings and written materials help community educators interested in establishing a local or regional consumer economics program to do so with the least amount of effort and expenditure of human and financial resources.

DELIVERY SYSTEMS: HOW

In order to get your message across successfully you need to look into various ways of teaching consumers. Methods of teaching and reaching people with consumer education information which have, at one time or another, proven to be successful in adult community education include:

- Direct teaching of groups through classes, workshops, panel discussions, forums, short courses and mini sessions, discussion groups and speeches given in community rooms, schools, and colleges; teaching and disbursing of information in mobile units, in homes, at places of work (lunch and learn), in libraries, through social or service clubs, through civic organizations, at religious sites; and teaching on a one-to-one basis in homes.

- Newsletters, home-study courses* and self-learning kits geared to specific audiences and offered in homes to young mothers, the elderly, working couples, etc., who cannot easily attend meetings.

- Fact sheets and leaflets on one specific topic; flyers bearing short messages, left at places where consumers congregate.

- Use of mass media including consumer articles written for newspapers and/or magazines, regular newspaper columns, radio announcements, appearances on television shows, cable TV programs.

- Displaying educational material (one or two sets) in doctors' and dentists' offices, with flyers on hand to register for classes or to receive further information; distribution of educational literature (leaflets) through Welcome Wagon hostesses.

- Telephone answering service on specific topics at certain times staffed by professionals or paraprofessionals; automatic telephone service offering a choice of two- to three-minute cassettes containing information on different topics. There might be a telephone tape library offering educational three- to five-minute messages on selected topics, presented in laypeople's language. As examples, many hospitals offer this service as a "health information telephone service;"

*An actual example of the planning and implementation of a home-study course is presented on pages 39 to 44.

County Extension offices may offer this "Dial-a-Message" system for homeowners on subjects such as landscaping and plant diseases, home and family living topics.

- Envelope stuffers with educational messages for enclosure in such things as bank statements and utility bills.

- Recruiting and training volunteers or paraprofessionals to work with individuals or families in people's homes or in small group situations.*

- Educational exhibits at county or local fairs; a booth offering information set up at supermarkets, department stores; setting up a fair in a shopping mall.

- Consumer information offered through in-house organizations, such as an industry newsletter to employees.

- Traveling mobile unit offering consumer education in an informal manner at shopping centers, parks, etc.

THE HOME-STUDY COURSE
(An Example)

As an information delivery system of community outreach, the home-study course provides:

- a method for reaching people for whom attending learning sessions is not feasible;

- a method of imparting more comprehensive information than is generally possible in the time restraints of learning sessions;

- a method of continuous monitoring of participant reaction and interest to the course administrator;

*A good example of this is the EFNEP program funded by USDA. Expanded Food and Nutrition Education Program - U.S. Department of Agriculture - SEA/ Extension - Washington, D.C. 20250.

- a method by which participants can gain knowledge and skills in a desired subject area in the privacy of their own home, on their own time, and at a modest expense;

- written information on subject areas which gives participants permanent access to the information;

- a method by which participants can share the information and/or materials with other family members and friends or to use in their work, if applicable; and

- a catalyst for family communication and decision making.

Design

In congruence with the project objectives, five topic areas (units) were included in the course "Your Money Matters" (written as part of the project).

Unit I - Financial Planning
Unit II - Coping With Credit
Unit III - Planning For Protection - Life Insurance
Unit IV - Financial Aspects Of Buying A House
Unit V - Making Your Money Grow

Each of the units was mailed in a titled folder and contained:

1. A cover letter.

2. Fact sheets:

   a. Each fact sheet discusses a specific aspect of the unit topic.

   b. Fact sheets are divided into sub-topics with short discussions under each heading.

   c. Each fact sheet consists of two to four pages.

   d. Fact sheets are consecutively numbered.

   e. Fact sheets in different units are printed on different colored paper.

3. Quizzes.

4. Participant feedback mechanism through:

   a. A question at the end of each quiz - "Have you used or shared any of this information from the fact sheets, or do you plan to? If yes, in what way?"

   b. An offer for supplemental material for most units.

5. Pamphlets, charts, additional fact sheets, or other material which amplifies the unit topic.

6. Envelope addressed to the course administrator in which the participant may return the quiz.

Implementation

To promote the course and enlist participants, the following strategies were used:

Newspapers - articles were written in the local newspapers about the project, including an explanation of the home-study course and information needed for registration.

An announcement was printed in the County Home Economics Extension newsletter.

A cover letter and registration forms were sent to community service organizations, such as the YWCA, Urban League, Middlesex County Welfare Board, etc.

A cover letter and registration forms were sent to other individuals and groups who had had previous interaction with the project.

Administering the Course

The process of administering the course was as follows:

1. A cut-off date for registering for the course was announced.

2. The first unit was sent to registrants. In addition to the aforementioned material, this unit contained:

   a. A brief description of the topics in each of the units, and

b. Procedural directions for taking the course, including the schedule for returning the quiz and receiving succeeding units.

3. A three-week interval was allowed for study. The quiz was returned to the course administrator within this interval.

4. The returned quiz was corrected and photocopied by the administrator. (No actual grade was placed on the quiz, but incorrect answers were marked and explained.)

5. On the scheduled day the second unit was sent to all registrants. This packet also contained:

   a. The corrected quiz from the previous unit, if returned; and

   b. Requested supplements from the previous unit, if offered.

6. This process was repeated for each unit.

7. A congratulatory letter and certificate of completion was sent to participants who completed the five-unit course. Completion is established if a participant marked and returned all unit quizzes.

The attached chart was found helpful for record-keeping purposes and administration and evaluation of the course.

Suggestions For Using the Chart:

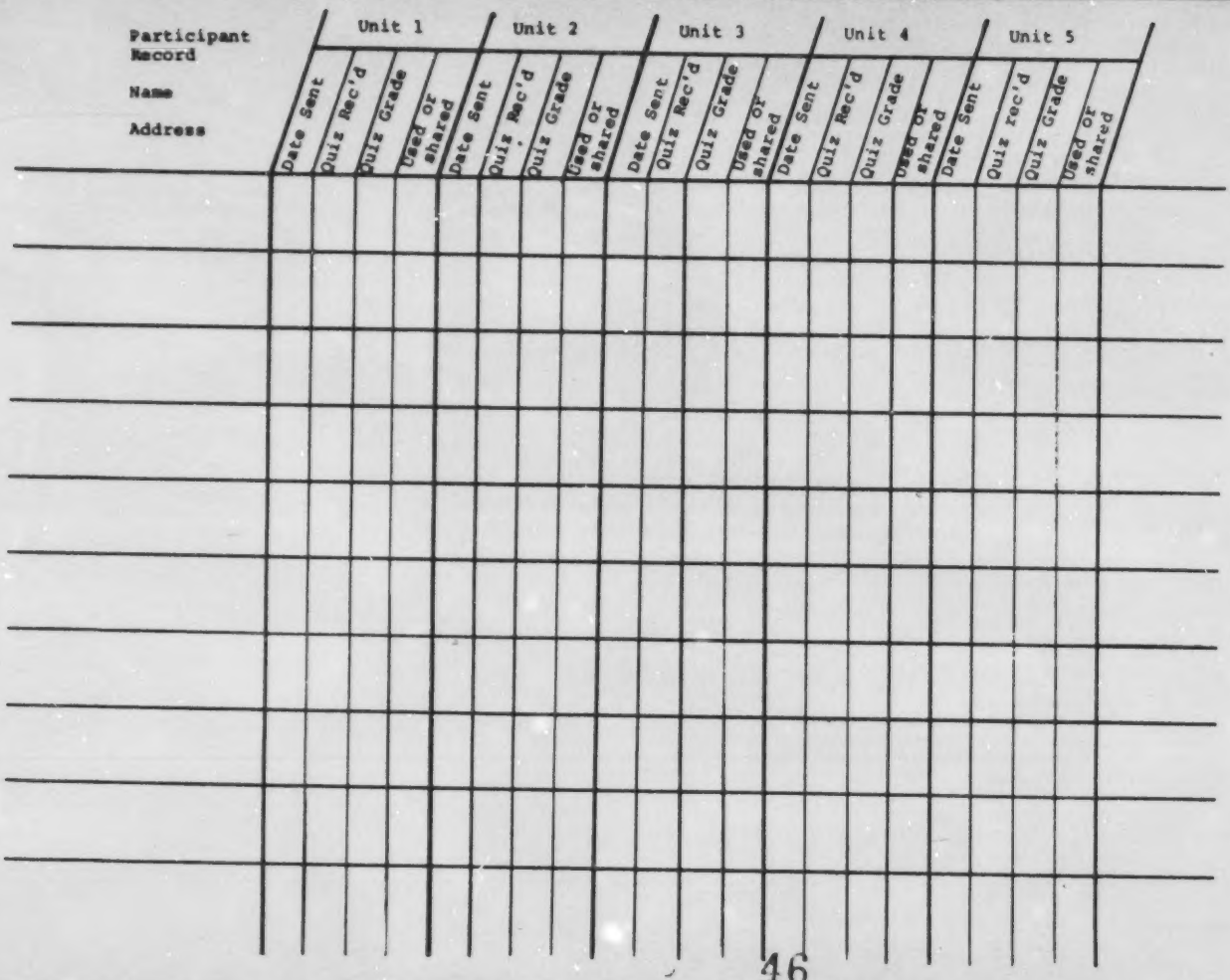
- Alphabetize names of registrants (it also helps to alphabetize the photocopy of the quizzes in unit folders by registrants' names for evaluation.)

- For each unit, record:

  date sent - if the date is the same for all registrants, it need only be written once, then check this column for each participant as his/her unit packet is mailed.

  quiz received - as each quiz is received by the administrator, the date is recorded in this column.

  quiz grade - although no grades appear on quizzes returned to participants, the number of correct answers is placed in this column.


Participant Record
Name
Address
Unit 1
Unit 2
Unit 3
Unit 4
Unit 5
Date Sent
Quiz Rec'd
Quiz Grade
Used or shared
Quiz rec'd

used or shared - if participant indicated that the information or material was used or was shared with others, this column is checked.

Finding the optimum way of reaching people* includes considering optimum location and appropriate time (the where and when of your program).

FINDING THE BEST LOCATION: WHERE

Finding the best location means asking yourself the question: Where do people congregate? Are the consumers you want to reach young, newlyweds, a young couple with children, or elderly? The places where they are likely to be found will differ depending upon whom the consumers are you want to reach.

- Newlyweds might be located by looking through marriage announcements in newspapers, through a religious organization, or through a newcomers' club or Welcome Wagon type organization.

- Elderly consumers might congregate at senior citizen centers, religious centers, the YWCA/YMCA, YMHA, or other such institutions.

- Young families with children will be very busy at home and the adults involved might not be able to leave the house as often as they would like, although they need information on how to handle financial matters, how to treat children in terms of money, and how to help them become effective consumers. Why not reach them through a newsletter, telephone messages, consumer memos, supermarkets, or pediatricians?

*Additional information can be obtained from "Reaching and Teaching Young Families," A Handbook for Extension Staff, Extension Service, U.S. Department of Agriculture, ESC 573, Washington, D.C.

. The following are examples of creative places consumers might be reached with information; some will be repetitive, but have been intentionally placed here to reinforce their importance:

At home (home-study units, newsletters, fact sheets); public places (libraries, posters in supermarkets, flyers); organizations (tenant's organizations), clubs (Lions, Women's Club).

On streets (flyers, announcements of programs, mobile unit).

At place of work (lunch and learn programs, in-house newsletter, envelope stuffers with paycheck).

At religious centers (after-service program for parents while youngsters have an organized program).

At community centers (all times).

Local offices of Cooperative Extension Services, YMCA's/YWCA's and adult schools, colleges, day-care centers, (information about programs can be sent home through youngsters).

At places where people bank and conduct their financial affairs, such as banks, credit unions, investment and insurance brokerage houses (exhibits, information booth, leaflets included in their mailings).

Agencies (fact sheets, consumer information to those on their mailing list).

At doctors' or dentists' offices (literature, program announcements).

At unemployment offices (literature, learning sessions announced).

In parks and at public or private recreational facilities.

In stores and shopping centers and malls.

CHOOSING THE OPTIMUM TIME: WHEN

The time of day one offers a program is of great significance. To illustrate this point, more and more women work today. Many are too busy to go out at night to an educational program; neither are they home during the day (Monday-Friday) for discussion group seminars. But Saturday might be a good time to bring them out for a seminar. Newsletters will certainly reach them at home as would home-study courses or mini-units. Saturday might also be the day the spouses would join them in their endeavors.

A lunch and learn program conducted at an employer's site offers good timing and a convenient location. Similarly a program can be scheduled for young mothers at the library while their children are busy attending the story hour. The following examples are offered as strategies involving successful use of the elements of time and place:

LUNCH'N LEARN SERIES
(An Example)

Overview

In April, May, and June 1978, three Lunch'N Learn series (a total of 12 sessions) for university secretaries were initiated and conducted on the Rutgers campus. Each series consisted of four one-hour sessions (one per week for four weeks) on different areas of family financial management and included after-session counseling in two of the three series. All sessions were held during the lunch period at a facility provided by the university.

Conclusions and Recommendations

The use of the lunch hour for learning sessions was found to be an excellent time to reach working consumers. The participants in this program were more than willing to make use of their lunch hour by attending this free mini-course. The major advantage of this approach is that it allows working consumers time for self-enrichment through learning sessions without adding to the time they spend away from home.

The major drawback is the strict time limitation available for the session. Thus for a lunch and learn series to be effective, the following suggestions are recommended:

1) The meeting place should be within short walking distance of the target audience.

2) Coffee or tea should be provided and ready at the appointed hour.

3) The presentation must be well organized if material is to be covered. However, when teaching adults, the presenter must always remain flexible in order to meet the needs of the participants.

4) Question-and-answer and discussion formats are important teaching methods which add to the informality and rapport between the presenter and learner, but these methods must be moderated carefully due to time constraints.

5) If possible, it would be advantageous to enlist the cooperation of the participants' employers. It might even be possible to extend the lunch time. From a public relations angle, remember, however, that participants must be back at work at the appropriate time.

6) Experience showed that it is beneficial if the presenter plans for extra time to answer personal questions from participants after the end of the session. Thus there is additional teaching/learning going on for those participants who want and can stay longer.

AN AFTER-HOURS PROGRAM WITH INDUSTRY
(An Example)

Overview

Three series were conducted at two New Brunswick companies. Each of the series offered sessions in family financial management presented by professionals in different areas. The learning sessions were held at the end of the work day on the premises of the cooperating industry.

The community coordinator organized the series together with the personnel managers of Midland Ross and Surgikos. The project director was part of the planning committee and conducted individual sessions at Midland Ross and Surgikos. The Midland Ross program reached both middle-management and blue-collar workers.

The Surgikos program included only management and secretarial personnel.

Conclusions and Recommendations:

Employers are becoming increasingly aware of the advantages of providing nonwork-related services to employees. Thus, in an effort to improve employer-employee relations, many companies are willing to co-sponsor programs for the self-benefit of the workers. Companies may be willing to supply meeting rooms on the premises and provide advertisement and promotion for a series.

After completion of the Surgikos series, a conference was held with Mr. Weisberg, Manager, Organizational Planning to discuss his assessment of the program as it was presented to Surgikos and his suggestions for, and input into, the most effective methods of working with industry.

He felt the series was very well organized and presented, the speakers excellent, and the topic covered of interest and importance to all consumers. He felt his company benefited by providing this service to the employees. The following recommendations surfaced at the evaluation meetings held after the sessions and interviews with the personnel manager, project director, and project coordinator:

When Working with Industry, Consider the Following Suggestions:

1) Contact the president of the company or the personnel manager responsible for programming. Explain fully the purpose of the service (a flyer is helpful) and the benefits to the company of co-sponsoring this type of program.

2) Present examples of past performance records.

3) Have a workable course outline giving potential sessions, dates, speakers, etc.

4) Record in writing all delegations of authority, i.e., methods of promotion, when and by whom promotion is to be carried out, etc.

5) Enlist the cooperation of labor union officials if applicable.

6) Make sure that you have the full cooperation of the personnel manager and/or union leader or others on your planning committee regarding distribution of promotional brochures and that full moral support is given to the project team.

7) Conduct a needs assessment in cooperation with the personnel manager and/or union leader to pinpoint exact needs and problems of the employers which the program will try to meet.

8) After informing employees of the results of the needs survey, include a registration form with the program outline and make registration mandatory by a certain date.

9) Have a simple evaluation form prepared to hand out at end of series to be filled in by participants.

10) Share tabulated data and results of evaluation with your industry liaison person and the planning committee to assure future cooperation. Industry representatives are used to working with figures and always look for tangible results. Your performance of an evaluation and dissemination of the results will be impressive and will command their respect.

The illustrations presented in this chapter are just that--illustrations. With particular reference to project planning and development, keep in mind that creativity and ingenuity are many times the only boundaries in an educator's quest for new horizons.

Chapter 3:

PROJECT IMPLEMENTATION

WHAT IS PROJECT IMPLEMENTATION?

Implementation is the action taken based on your program design. It is the real productivity test. It indicates who was taught, when, what, where, and how. It is here that the success of your community outreach program will be tested, weighed, and decided.

If your planning has been thorough, there is no need to be afraid of failure. If some strategies do not work as you had anticipated, do not be afraid to admit this and to make the necessary changes. This is what program planning, design, and implementation are all about.

The following two ideas, stressed by Silverman in Project Management, have been adapted by the authors for educational projects:

1. The jump from planning a project to actually coordinating and controlling it while in process is difficult for many people. Many professionals have been specialists of one kind or another and now as managers have to be generalists, who oversee and control.

2. The requirements for successfully completing the planning aspects of a project are usually quite different from the requirements for implementing and controlling that plan.

In the beginning or planning stages of a project a "supportive or cooperative style is generally necessary in order to secure everyone's cooperation in a fully defined, rather fluid situation. Later, when plans are completed, designs frozen, and production underway, a more directed, business-like style is needed to meet specific time-cost restraints." It is very difficult to change "one's management style" to meet the changing needs of the situation, but "in project management, it's a necessity." A successful "style" during the beginning phases can be a liability in the implementation phase if it is unchanged.

If you are interested in further study on this topic, you might also want to read A Theory of Leadership Effectiveness, Fred E. Fiedler, McGraw-Hill, 1967; or consult some other books on this topic.

EXAMPLES OF DIFFICULTIES AND BENEFITS IN PROJECT IMPLEMENTATION

The authors feel that it is important for project managers (especially those for whom this role is a new one) to be aware of some of the difficulties which can be experienced in project implementation:

- Difficulty with personnel insofar as they are temporarily brought together for the project. Also, personnel have different backgrounds and not enough time to get adjusted or not enough interest to do so.
- There is a question of loyalty to project director.
- Other interests might be placed before project responsibilities.
- Time is needed to become familiar enough to communicate successfully regarding project needs.
- People outside the project team don't always understand mission and goals of the project.
- There might not be enough support given to team members from regular staff.
- There is great pressure for "success" and for achievement in terms of reaching the project's goals.
- Many people find it difficult to have to leave the project after a certain period of time, although it was pre-arranged; some bitterness can result.

On the positive side, there are some real benefits as far as the program implementation is concerned, such as:

- great flexibility (at least greater than in the regular program where channels are established).
- the generation of new ideas.
- creativity can be at its peak.
- possibility of trying things out at the spur of the moment or on relatively short notice.

- a relatively inexpensive way of putting together or trying out some new project ideas. If they do not work they can be discarded; chances are that there will be some very good results coming from the project, even though some might be different than expected. If the ideas work out as projected, so much the better; then the entire process can be applied on a larger scale and integrated into the regular program and into the larger organizational structure.

Elements of program implementation include the promotion of your project and the delivery or action taken.

MARKETING YOUR PROGRAM
(Project Promotion)

General Strategies

General strategies towards successful implementation and promotion include:

- Making a plan that includes resources you have at hand and a time frame.

- Analyzing the various methods of implementation available to you and selecting one or two which you feel is best suited to your audience.

- Using community resources for coordination of efforts; maybe you need a co-sponsor for your program, or need assistance in other ways. You can use community resources for facilities and speakers and as referral for information and audiences. See the chapter on "Utilizing Community Resources" in Personal and Family Finances, a Resource Guide for Teaching.

- Using advisory committees in program implementation. The roles they play can vary greatly. To make them effective, it is important for you to analyze for yourself why you need them, how you will use them, and what you have to offer in return (more on the use of advisory committees can be found at the end of this chapter).

. Employing some or all of the following suggestions:

- Develop a folder on your organization and the project; include all relevant material. This folder can be used when introducing the program to people in the community, industries, agencies.

- Identify weekly and daily papers, shoppers' magazines, radio stations, and supply them with promotional information on an ongoing basis.

- Develop attractive, inexpensive flyers about your project. Send letters to key leaders in your community. Such flyers and brochures can be included with the letter to help sell your project.

- "Package" your educational program in an appealing and creative way. This means choosing an innovative title for your program, such as "Money Matters for Teens" instead of "Budgeting for Teenagers" and including an exciting course description. The following list of titles might give you some ideas on developing your own program title:

LIST OF POSSIBLE CONSUMER EDUCATION TITLES*

Families in Crisis

Non-fault/Default

Stress Points

Family Adjustment to Economic Change

Think for Yourself

New Coping Techniques

*These ideas for titles are the result of a brainstorming session with R. Friedman, B. Macauley, A. Burkart, F. Minifie, R. Speelman, (Extension Home Economics Specialists) on creative topics and titles in consumer education in 1977.

Creative Coping for Consumers

Shifting Gears in Financial Management

To Cope or Cop Out

Adapting to Change

Adjusting to Change

From Stress to Success

Availability of Resources

Financial Independence - Fact or Fancy?

Tunnel Vision or Vista Vision

Focusing Goals for Consumers

Real Problems - Real Solutions

Instant Society - Instant Success

Be Your Own Expert

Explore Your Options

Consumer for All Seasons

Locking Yourself into a Life-Style

From Cadillac to Pontiac - Realizing Your Limitations

Financial Stress and Strain - A Habit?

Time Trap - Money Trap

Spending Yourself

Don't Panic - Adjust

Environment - Consumer

Future - Stretch!

- Offer refreshments and a social hour. This activity can serve to break the ice.

- Negotiate with the industry and labor unions where you are holding your program to have half the time for the course

donated to employees, the other half being the employees' contributions. Let this be known to the people involved well ahead of time.

- Announce that you will be giving out certificates of achievement to those who attend the entire course.

- A fee might be charged (e.g., $6 for a six-session course), and returned to the consumer after completion of a course.

- Write short, appealing, meaningful radio announcements, flyers, news releases, or feature articles for the local newspaper.

- The project director can either be interviewed by a staff reporter or the announcement can be developed jointly. Post the flyers in supermarkets and libraries, deliver them to homes of consumers, and distribute them through organizations.

- Include an interesting person on the program who "draws" crowds (it can be a local politician, some respected government official, or a celebrity).

- Last, but not least, go out and find consumers at places where they congregate: hospitals, baby health clinics, women's centers. Explain your program directly and give out flyers and brochures.

Tailor Your Promotion To Fill Special Needs

In addition to the regular promotional activities, you need to develop a specific promotional strategy for the particular project you are planning.

The strategy is different when you promote a program geared towards industry employees in-house as opposed to one which is open and aimed at the general public. The promotion of the latter will differ again depending on how you deliver the program. For example, if you co-sponsor a project, the announcements will go to more than one mailing list and will reach more people.

The promotional strategy adopted will also depend on the type of audience you are trying to reach (e.g., young families, senior citizens, etc.). You need to be sure your information will reach your particular audience.

Only you can develop a promotional strategy which will work for you. The following examples might help you in developing your own successful marketing style and approach.

A Promotional Strategy Involving Retail Businesses

This strategy was developed and implemented in the federal project (a similar strategy can be employed when working through industry establishments).

You decided that you wanted to work through retail establishments in the designated community, either to co-sponsor a project for company employees or perhaps to utilize their credit manager as a resource person for a class open to the public using their community room or some other location. You have chosen the retail establishment because a large number of people walk through retail stores, and many of these people would benefit from your information and your program.

What do you do?

Step 1

Identify retail establishments in the communities in which you want to work. Gain their cooperation and assistance for your project.

- Draft a letter of introduction indicating the who, what, when, where, how, and why of the project; also say what type of support is expected and why.
- Identify the decisionmaker(s) in the retail establishments - who has authority to make the programming decision. Address your letter to this person (e.g., the general manager or personnel manager).
- Explain how cooperation on this project will help the retail establishments.
- Explain how their cooperation can and will benefit consumers.

Mail a model letter to those retail establishments interested in your project (each one receives an original letter, not a photocopy). Enclose a pamphlet or other pertinent printed material. (This pamphlet should have information on the project to familiarize the receiver with the project.)

Step 2

- Contact key people in the above establishments by phone as a follow-up to the letter.
- Arrange appointments.
- Meet with people in the personnel department and with those in the organization's office of development and consumer affairs and/or public relations department. If there is a union involved, include a union member (steward or other) as well as a member of the group to which the program is to be presented, if possible.
- Set a date for a program planning meeting regarding specifics of content, time, and resources needed.
- Follow up the meeting with a letter to reinforce the intention towards further cooperation, and to thank the manager or personnel officer for his or her time.
- Organize the next planning meeting. Proceed with implementation of the program (choose title, order rooms, invite resource people, promote and hold the meeting; after the program is completed, do necessary follow-up and evaluation).

Basic Steps in Implementing a Conference*

The following is a detailed planning guide. Although the steps were developed for the planning, implementation, and evaluation of a formal conference, they will stimulate thinking and can be readily adapted to the management of any type of educational program.

*Quoted from Training Program for Consumer Education by Lynn Jordan, former President, Virginia Citizens Consumer Council.

(1) Determine the purpose and objectives of the conference. Decide what you want to accomplish and who your audience will be.

(2) Choose a conference committee. The committee should decide who will make decisions and who will do the work.

(3) Write a proposal and secure funds. This requires preparing a budget.

(4) Determine the agenda: topics, speakers, format, group rules. Go back to your objectives. Be specific when you invite speakers; tell them exactly what you expect. In most situations, it's probably best to develop a format that will encourage interaction among participants.

(5) Select conference facilities. Consider the atmosphere: will it encourage participation?

(6) Develop criteria for choosing participants.

(7) Publicize the conference.

(8) Prepare brochures and application forms and use the media to recruit participants.

(9) Locate housing and transportation for participants and speakers.

(10) Prepare background materials and conference program. If you expect participants to do pre-conference reading, let them know. Also send participants maps, conference schedules, information about available time for sightseeing, etc.

(11) Assemble equipment and confirm arrangements. Contact the facility's staff on a weekly basis the month before the conference. Confirm arrangements with equipment suppliers. Call or write all speakers about a week before the conference "just to make sure they have no last minute questions or problems."

(12) Prepare facilities. If possible, visit the facility the day before the conference begins. Make sure someone is on hand to greet participants, especially speakers and discussion leaders.

(13) Hold the conference. If you have done a good job of preparation, this is the easiest part. Some things will go wrong, but you will have anticipated them. Try to stay on schedule.

(14) Conduct follow-up activities. If participants are assigned follow-up activities keep in touch with them.

(15) Evaluate the conference. Try to identify what you did well, and what you could have done better.

(16) Report the results. Write a report on the conference for your funding source, members of your committee, etc. Use your experience. Write a "how to" manual for fellow educators.

WORKING SUCCESSFULLY WITH AN ADVISORY COMMITTEE

Many projects require the establishment of an advisory committee or board which should include some consumer representation. The roles committees play can vary greatly. For example, the committee's general function might be to advise on all aspects of the project, or just on one particular segment. Whatever the role it plays, you can be the beneficiary of pooled talent, enthusiasm, and knowledge. To make advisory committees effective, it is important for you to determine why you need them, how you will utilize them, when and where you want to meet, how long meetings will last, how often you will need to meet, and what limitations there are on the authority of the committee, if they have any authority at all. You might also consider what you have to offer in return for their cooperation or participation.

Using the Services of an Advisory Committee in Program Implementation

Here is an example of how an advisory committee developed a strategy to improve the effectiveness of a consumer education outreach program.

RUTGERS UNIVERSITY - COOK COLLEGE

COOPERATIVE EXTENSION SERVICE

FEDERAL PROJECT:

"Helping Families Adjust to Economic Change"

FEDERAL PROJECT ADVISORY
COMMITTEE MEETING

RAMADA INN
Rutgers Room
New Brunswick, N.J.

December 8, 1977

The people invited to participate were chosen because of their willingness to participate, their expertise in consumer education, and/or knowledge of the community. The group included representatives from banking, industry, education, and community agencies.

The preparation for the meeting lasted several days. The committee meeting itself lasted half a day. The entire project staff was involved in one way or another. The committee was oriented toward the overall project and given a specific objective to work towards:

The objective of the meeting was to explore ways to effectively market the consumer education project to different audiences in Sayreville, New Brunswick, and Perth Amboy. The committee dealt with:

*ways to reach target audiences (methods, strategies).

*how to increase the number of clients (making service more appealing, taking into consideration changing life-styles, etc.).

*how advisory committee members can contribute to the educational delivery system.

After the initial introduction, review of the objective, and presentation of the scope of the

overall project, the advisory committee members divided into four groups, each group having responsibility for one specific audience type (see exercise charts 1 and 2 on pages 65-69). Four individuals who were knowledgeable about the project were given proper instructions and guidance and served as discussion leaders for each group.

Each group selected a reporter who, at the end of the brainstorming session, reported to the entire committee the types of delivery systems on which the group had placed priority. The evaluation of this meeting showed that the advisory committee members felt the format was successful and the time spent was well worth their effort.

When selecting members to your advisory committee, you should include, if possible, someone from the audience for which the project is being planned for identification of interest. Other members should be chosen carefully as to their sensitivity toward your program, what they can and might want to contribute, educational background, etc. The professional talents of the individuals as well as the benefits advisory committee members can derive through this involvement should also be considered.

GROUP SESSION I

GROUP BRAINSTORMING ACCORDING TO FAMILY STRUCTURE

FAMILY INCOME	SINGLE PERSON HOUSEHOLD	TWO PERSON HOUSEHOLD	TWO OR MORE PEOPLE IN HOUSEHOLD	SINGLE PARENT HOUSEHOLD
45,000 ↑				
↓ 5,000	A	B	C	D

This group works with:_____ (Group_____) within the 5,000-45,000 income level family.

1. Identify types of single household audiences:

2. Looking at the community data sheets, is there any clue as to what group(s) warrants priority attention? Be as specific as possible.

3. Cite specific methods (delivery systems) which might appeal to different target audiences.

4. How can we package content appealingly? (according to subject matter, e.g., Credit rights: Programming your $'s, or according to audiences)

5. How can we increase our audiences?

6. How can advisory committee members contribute to the delivery system?

GROUP SESSION #2

STRATEGY (method) _____

_____

WHO: (target audience)

HOW:

WHERE:

WHEN:

A Second Illustration

The following example consists of the second major advisory committee meeting which was held four months after the first*:

"Helping Families Adjust to Economic Change"

USDA specially funded project

Second Advisory Committee Meeting

April 18, 1978

Holiday Inn

Route 1

North Brunswick, N.J.

Agenda

- Committee members arrive and register
- Welcome by Dr. John Gerwig
- Informal introduction of all committee members
- Overview of project and home-study course by Denise Matejic
- Reports by:

  Dr. May Huang - Evaluation

  Richard Sprince - Community Outreach

  Suzanne Bonamo - Lunch'N Learn (On-Campus Outreach)

  Frank McHugh - Sub-committee - Public Communications Liaison (Banking Stuffers)

*Throughout the duration of the project many informal meetings were held with various members of the advisory committee either by phone or in person. This was done on a smaller more informal basis as needs arose.

Viola Van Jones - co-sponsored Community and Campus Outreach - Women's Center

- Reaction to Objectives
- Discussion of Objectives
- Adjournment

The objectives for this committee meeting were as follows:

Objectives (as presented to members)

* To inform you what has been accomplished as an outgrowth of your suggestions from the last meeting.
* To determine if there are any aspects of the program that can or should be continued after the deadline of the project.
* If so, to decide how you or your organization can help continue the outreach program and promote the concepts taught on family resource management within the guidelines of the Co-operative Extension Service.
* To identify any problems you might notice in the implications of our program and suggest possible solutions.
* To share any successful programs you have had with consumers to see if there are any areas where we should modify our programs to ensure their success.

The above example illustrates the successful cooperation between a project team and the community.

Depending on your funding and your project's needs, you can involve an advisory committee as early as the preplanning stage, or later in the implementation or evaluation stages.

TOOLS FOR IMPLEMENTATION

If project management is new to you, chances are the following tools will help you:

Timetable

To facilitate the reaching of objectives and to maximize your project staff's resources of time, energy, and money, you need to set up timetables and develop plans of action which show when certain tasks will be accomplished, who will accomplish them, and what individual or group activity is in progress or completed. The following charts will help you in setting up your own schedules. The blocks should be filled in by writing down the various tasks and what needs to be accomplished (see Table 4 for illustrations).

TABLE 1

TIME SCHEDULE FOR ALL MAJOR PROJECT TASKS OR EVENTS LISTED RANDOMLY TO BE COMPLETED FOR THE NEXT SIX MONTHS (OR YEAR) INCLUDING WORK DONE BY ALL PERSONS INVOLVED IN PROJECT

Tasks to be done	Jan.	Feb.	Mar.	Apr.	May	June
Task Z						
Task F						
Task A						
Task N						
Task Y						

After the above chart has been filled out, analyze the tasks and list them in chronological order of priority as shown in Table 2.

TABLE 2

TIME SCHEDULE FOR PROJECT TASKS OR EVENTS LISTED CHRONOLOGICALLY AS TO BEGINNING DATE FOR THE NEXT SIX MONTHS (OR YEAR)						
Tasks to be done	Jan.	Feb.	Mar.	Apr.	May	June
Task A	X	→	→	→	→	→
Task N		X	→	→		
Task Z			X	→	→	→
Task F				X	→	→
Task Y					X	→

"X" shows beginning time and "the arrow" shows continuing task. If the task is to be completed before June, stop the arrow in the month of anticipated completion. For example, task "N" is to be started in February and completed in April.

Task or Job Responsibility Charts

If more than one person is involved in the project, you also need to think through and develop a group task responsibility chart(s). The following chart is one method you can use to divide job responsibilities among people and analyze tasks.

The first time you work out this chart, have large pieces of paper available and list all tasks as they come to mind. This type of activity can be done at a staff conference or when all members are present and can contribute.

The second time you prepare the chart, group the activities by their function to make the chart clearer. This is an excellent management tool for analyzing tasks, readjusting workloads if necessary, etc.

TABLE 3

CHART OF JOB RESPONSIBILITIES

Person 1*	Person 2*	Person 3*	Person 4*
direct project and coordinate overall project	conduct consumer education program in community	assist in evaluation design	direct evaluation efforts
coordinate evaluation efforts	write releases	conduct follow-up interviews	design evaluation model
monitor budget	promote programs		
supervise graduate student		observe teacher in class and evaluate performance	

*Name of person responsible for completion of each task.

Table 4 will show you at a glance a combined time and job responsibility schedule (who, what, and when) for a person on the team. Be aware that these tasks are sub-tasks taken from Table 1 which included the entire project's time schedule. The blocks in the chart should be used by the person responsible to list the progress being made toward completing the individual task. (Note Task F, "Write News Releases.")

TABLE 4
(An illustration)

TIME AND RESPONSIBILITY CHART OF PERSON 2

Tasks	Jan.	Feb.	Mar.	Apr.	May	June
Task F :	announce-ment Sent Jan. 5.					
write news re-leases	Send announce-ment of start of project to news-papers		dead-line for article in Apr.-May is-sue of prof. magazine			
Task Y						
ETC.						

To Summarize:

You need to set up a timetable and schedule to:

- remind yourself what has to be accomplished and when.
- analyze tasks and set them in order of priority.
- check if schedule is being followed closely.
- check if schedule is on time.
- modify if and when necessary.
- start from the beginning, end at the end, evaluate the program, and start the process again.

FINAL THOUGHTS ON IMPLEMENTATION

Your Audience

Exhibit sensitivity toward your audiences. Take into consideration the changing world in which we live. Today's varying life-styles demand increased sensitivity by the teacher-educator to all audiences. Make sure that you have an understanding and acceptance of different cultures and do not impose your values on others. Do not make the mistake of thinking people are "odd", or do things wrong if they do not do them the way you do.

In this effort you need to also identify people to whom the audience can relate. Sometimes this will be you, the teacher. Sometimes, if it involves a minority of other ethnic group, a professional who speaks the group's language or is familiar with the group you want to reach might be able to better communicate the educational program and teach with you.

Working with Other People - Some Tips

Before working with other agencies or organizations in the community, before even approaching them to ask for support or cooperation, or before establishing an advisory committee, ask yourself some questions, as the members of our project team tried to do on an ongoing basis:

- What are my objectives? What exactly do I want and need from people? What do I expect from them?
- What do I have to offer? What will others gain from working with me?
- How are they funded? Are there restrictions because of this funding?
- Is it really worthwhile? How will I know if it is? What kind of control do I build in to stop the cooperative effort if it does not work out?

If possible, be friendly, but brief. Know in advance how many hours you are willing to invest in each component of your project. Great amounts of time can be wasted through committee meetings, if not used and planned wisely.

A great deal of disappointment can be avoided if one follows the above advice. Not all people are as dedicated and cooperative as they seem at the cutset. Many agencies have their own strong interests and clients to serve and are not set up for cooperative efforts, although some are. This varies from time to time, place to place. Learn to adjust to it.

Changing Your Course of Action

There comes a time in every project when it becomes obvious that a change in strategy is necessary, for whatever reason (not enough people interested, not successful). It can happen because one had previously made false assumptions, or did not have enough experience, or did not know how to promote, or was not innovative and daring enough to try something new, or other factors.

In that case adjustments must be made in teaching strategy or teaching content, or in the promotional strategy. It might mean discarding one method altogether and pursuing a different one. This might not be an easy decision to make, but it might spell the difference between success or failure of your project. The following examples have been chosen to illustrate changes in strategies made in the federal project because of reasons cited above:

Examples of Changes in Strategy and Strategies to be Considered

- Changing from one major method of emphasis (e.g., lessons in community centers) to other alternatives.
- Offering refreshments and a social hour before class and gearing the program to one specific audience; going in with the help of a local resource person.
- Utilizing a mobile unit to reach consumers at fairs, and have innovative displays outside as well as inside.
- Changing from the downbeat topic title of "What to do When in Financial Trouble" to "How to Make Your Money Go Further."

- Changing from exclusively working out of a van to using different approaches to better penetrate the community.

- Working with other groups and becoming a speaker-resource person for their audience instead of only dealing with one's own group (increasing the number of people reached).

- Giving out a door prize to the person who brings guests (or who brings the largest number of guests).

- Scheduling a consumer education seminar in conjunction with meetings of other community organizations such as tenant rights groups.

Project implementation is probably the most important aspect of all of those things you have to do. Do not be afraid of it. If something does not work, try something else. Plans carved in stone are bound to crumble. Those made of plastic can be shaped as the particular shape needed reveals itself.

Chapter 4:

PROGRAM EVALUATION

Evaluation has always been considered an important activity, and is carried out in one way or another by most people in every aspect of life. Educational evaluation as a formal process is assuming greater importance now as the needs for accountability intensify. Legislators, policy makers, and administrators are increasingly demanding that program effectiveness be demonstrated through formal evaluations. These demands emphasize the need for extension workers to obtain sound evidence of the extent to which their community outreach programs are successful. Formal evaluation entails conscious procedures for placing value on programs according to explicit criteria and designs for collection and analysis of evidence (USDA, 1976).

In this chapter, the following areas of program evaluation will be addressed:

- evaluation functions,
- obstacles of program evaluation,
- contributing factors, and
- process of program evaluation.

Since this chapter is written for educational practitioners who have a genuine concern for and the responsibility of evaluating community-based educational programs, actual examples from our project are presented to help readers generate alternatives for evaluation purposes.

Program Evaluation Functions

Evaluation can serve many purposes to many people. As a continuous process consisting of systematic planned activities, evaluation can provide valid, reliable, and timely information for a wide range of decisions--instructional, curricular, managerial, and policy making (House, 1977).

In our project, program evaluation is part of the overall program development process, which includes: (1) community and clientele analysis, (2) objective setting, (3) program design, (4) program implementation,

and (5) program evaluation. It has provided us with constant feedback for the purpose of program improvement. It has also suggested reformulation of program objectives, strategy, delivery system, educational methodology, and target audiences.

In addition, program evaluation has assisted in reaching decisions on future directions and design of community outreach programs. Decisions on whether programs should be curtailed, maintained, expanded, or terminated have also been aided by information generated through program evaluation.

These major functions of our program evaluation have been derived through a careful deliberation and analysis of the project goals and objectives stated in the funded proposal. They have provided a sense of direction for the project director and the evaluator in developing and implementing the necessary evaluative strategies for the community outreach project.

Program Evaluation Obstacles

Program evaluation is designed for utility. Its purpose is to answer practical questions of decision-makers who want to know whether to continue a program, extend it, modify it, or terminate it (Stufflebeam, 1968).

Program evaluation is often much easier to describe in the ideal than to do in practice. It is invariably plagued by a series of obstacles. A review of some of the most pervasive ones seems to be appropriate before an actual example is presented to illustrate the "How?" in program evaluation.

Obstacle One - The goals of programs, especially community outreach type, are rarely simple and clear cut.

Sometimes a program has a straight-forward goal, such as developing an educational package in family resource management for Extension professionals. But often, program goals are many and diffuse such as to raise the level of living for individuals and families in a county. Usually, the higher the degree of vagueness and generality of the program goals, the more difficult it is to assess the extent to which these goals have been accomplished. Hence, one of the most

important tasks for a program evaluator is to ask potent questions to help the project staff crystalize their program goals.

Obstacle Two - Many program staff members are convinced of the program's worth and see little need for evaluation.

In most cases, the project staff is convinced of the program's worth. If the results of the evaluation are positive, they knew it all along. If the results are negative, it is probably the fault of the director, the evaluators, or the grossness of their measures, which are too insensitive to capture the subtle and important changes that are going on. The responsibility, therefore, rests upon the director and evaluators to help the staff understand and appreciate the value of program evaluation. At the same time, evaluators must take the time and have the patience to work with staff members either in small groups or individually in the development of workable strategies and devices for gathering the needed evaluative information.

Obstacle Three - Program staff may be reluctant to cooperate with evaluators.

The program's staff members often have interests and professional norms different from those of the director or evaluators. The staff's concern is usually service. To them, evaluation could mean disruption and delay of service. They may not want to take time from their primary role--helping people--in order to fill out forms or engage in other diversions that the director and evaluators seem to think essential. They need to be convinced that program evaluation is a powerful means to generate alternatives for the improvement of various program functions, including service to the target population.

Obstacle Four - The program being evaluated is rarely a simple entity.

Although there are programs that are well defined and relatively unchanging from one setting to another, most community outreach programs tend to depend heavily on the way staff members perceive and administer them. Wide variations can also occur in types of staff, their skills, style of service, the amount of time they devote to the program, participants' attendance, even the content and basic direction of services provided.

The fact is that community outreach programs often include a conglomeration of shifting activities that require enormous efforts to specify and describe. New and innovative programs particularily need to fumble around searching for a rationale, a strategy of action, and procedures of operation for quite a while before the staff settle on a course. Because of such initial uncertainty, evaluation from the outset is sometimes premature. In these cases, it may be better for the evaluator to wait until it is clear what the program is. It is rather common that program evaluators need to work with the project staff in the search of the program course at the very beginning stage of the project. It is paramount, therefore, for program evaluators not to make premature judgment on the worth of any community outreach program before its course is clearly formulated.

Obstacle Five - It is difficult to obtain control groups from the target population as a basis for a comparison with the group of people who has been served by the program.

In the case of community outreach programs, people usually attend programs on a voluntary basis. Those who attend tend to have a stronger motivation than those who do not. Their program performance sometimes reflects the effect of motivation more than the effect of the program. Besides, it is almost impossible to randomly assign individuals into a specific program while at the same time to have a comparable group of people who are not in the program for a comparison. Since this obstacle seems to be inevitable in the case of most community outreach programs, it is important for evaluators to introduce safeguards through the careful use of evaluation designs, strategies, statistical treatment, and/or follow-up study of participants to compensate for such inadequacy (Weiss, 1972).

In actual situation, one may find many more obstacles than what have been presented. However, these five seem to be most critical and pervasive, especially in the case of community outreach programs. The example presented hereafter hopefully provides some ideas on how some of these obstacles can be fully or partially overcome.

Program Evaluation Contributing Factors

Four practices have been found in our project as contributing to the effectiveness of our program evaluation. Each of these four factors is reviewed and discussed briefly in this section.

Factor One - The entire program evaluation of the project was a team effort of the director, staff, and the evaluator.

From the beginning till the end of the project, the team (director, staff, and evaluator) met together on a regular basis. For the first six months, the team met as often as two to three times per week and the length of each meeting ranged from two to four hours. Such meetings helped: (1) establish the necessary rapport among individuals involved, (2) decrease the discrepency between and among members' perception and expectation of program evaluation, and (3) crystallize the project goals and program objectives.

Factor Two - Pre-planning prior to each group evaluation meeting by the project director and the evaluator.

One to two days prior to the scheduled group evaluation meeting, the project director and evaluator planned and finalized the agenda for the subsequent meeting. Background materials were reviewed and discussed. Potential problems were identified and various problem-solving ideas were analyzed and evaluated. The result was 30 some most productive group evaluation meetings.

Factor Three - The project director had a strong commitment and belief in program evaluation.

The level of her commitment was evident in her recruitment of an external evaluator at the earliest possible stage of the project and in her openness in sharing and discussing every major program decision with the evaluator. Furthermore, she was willing and capable of viewing project matters from both managerial and evaluative perspectives. Seldom an evaluator has the fortune to work with such a project director. Evaluators must work continuously on increasing the level of commitment by the project directors to program evaluation through gradually gaining their confidence.

Factor Four - Evaluation meetings were conducted in a highly professional manner, issue- rather than personality-oriented.

During our evaluation meetings, dissenting opinion was usually appreciated, though not always accepted. Most importantly, disagreement almost never ended with negative confrontation. Brainstorming sessions were held constantly to generate ideas. Members attending each meeting often had a sense of accomplishment when they left. This practice helped facilitate an effective participatory decision making process. At the same time, it provided opportunities for multi-level communication.

Program Evaluation Process

The complexity of a program may influence the pace in which progress is made but seldom change the major steps through which a program can be evaluated. The five major steps in program evaluation are discussed in sequence as following:

Step One - Analyze project goals and program objectives.

This step is most essential because one of the major purposes of program evaluation is to assess the extent to which project goals and objectives are accomplished.

Program goals are precise statements of the project's intended end results. These results, hopefully, parallel the ultimate objectives of Extension programs. Objectives can be plans to utilize various kinds and amounts of resources (inputs) to carry out certain planned program activities which involve people to be served (target population). Objectives can also be intended outcomes indicated in the form of: (1) reactions of participants attending various program activities, (2) change in participants' knowledge, attitudes, skills, and/or aspirations ("KASA" change), and (3) application of acquired knowledge, attitudes, skills, and aspiration to work or life-styles (USDA, 1976).

The goals and objectives of a project should therefore form a hierarchy with a sequence for program evaluation. Such a hierarchy, consistent with the chain of events in Extension programs, provides a parameter in which data-based program evaluation can be conducted. Such a hierarchy consists of seven levels: (1) the ultimate program goals, (2) participants practice change, (3) participants KASA change, (4) participants

reactions, (5) target population involvement; (6) program activities, (7) inputs that are necessary for the attainment of ultimate program goals. Figure 1 depicts the hierarchy of goals and objectives for program evaluation, including evidence of attainment at each level. Decisions regarding the attainment levels desired by the project director together with the staff provide the basis for collecting evaluative information. For example, if the desired attainment level is "input", the evaluator needs to make evaluative judgment based on information collected only on the kinds and amounts of resources that have been utilized in the project. The more levels of attainment that are desired, therefore, the more involved and complex the program evaluation process. The higher the level of attainment, the more rigorous and demanding the evaluation means need to be.

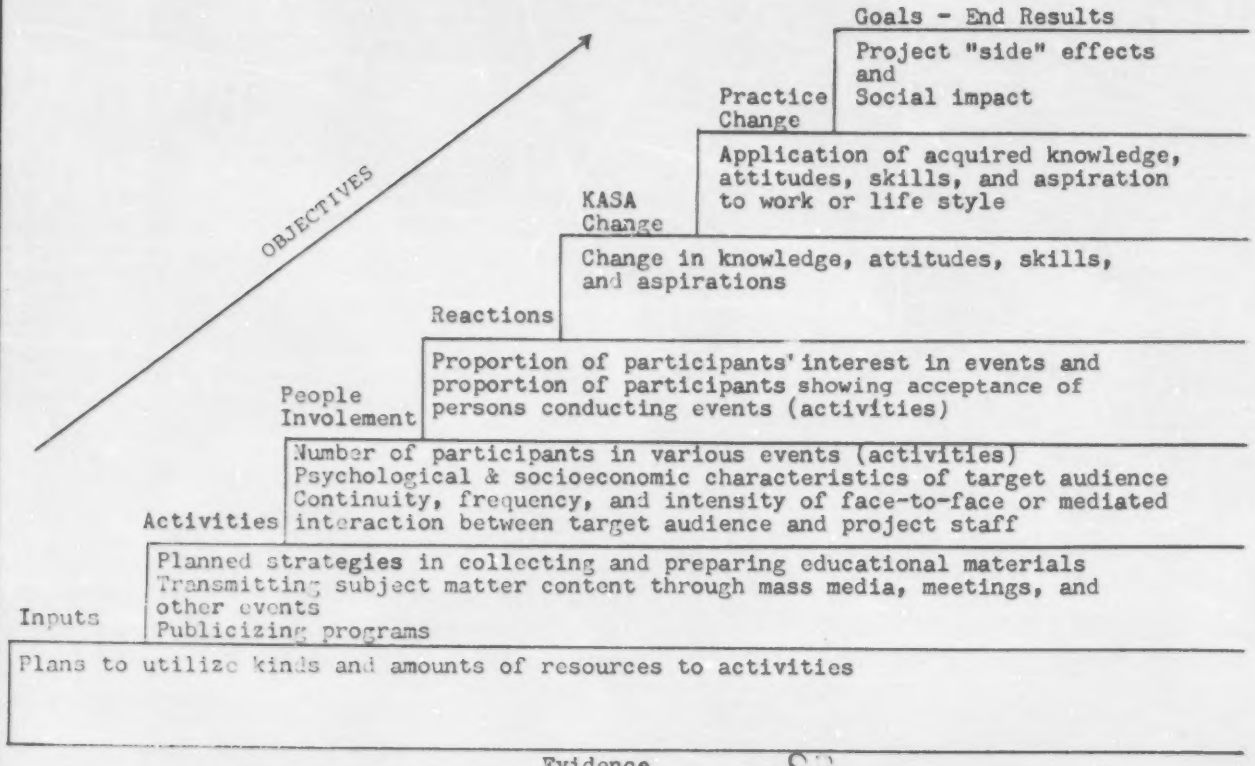
Initially, each program goal must be analyzed individually. When analyzing, you should ask, "Can this be achieved?" If the answer to this question is "No," the evaluator has the responsibility to discuss the reasons upon which such a conclusion is based. At the same time recommendation can also be made in terms of what may be done to increase the achievability of the goal and objective being analyzed while still maintaining the original intent and rigor of the program. Usually, the more realistic the goal is, the better chance it has to be accomplished. If the answer to such a question is "Yes," further questions must be asked.

"Is it clearly stated in measurable terms?" is another important question evaluators must ask when each goal and objective is analyzed. The more precise and concrete the goal statement is, the better chance it has to be evaluated objectively. Often program goals are stated in vague and general terms. If so, the evaluator has no choice but to use subjective rather than objective means to assess the extent to which these goals are accomplished. Subjective assessment tends to allow too much room for personal bias and misinterpretation. If possible, therefore, the evaluator should help the project director and staff formulate their program goals and objectives in concrete and measurable terms.

In addition to analyzing the achievability and measurability of each goal and objective, evaluators must determine whether or not all program goals and objectives are consistent. Lack of consistency among goals and objectives tends to generate conflicts in management, delay or hinder the progress of the

Figure 1

HIERARCHY OF GOALS AND OBJECTIVES FOR*
PROGRAM EVAUATION AND EVIDENCE OF ATTAINMENT LEVELS


Goals - End Results
Project "side" effects and Social impact
Practice Change
Application of acquired knowledge, attitudes, skills, and aspiration to work or life style
KASA Change
Change in knowledge, attitudes, skills, and aspirations
Reactions
Proportion of participants' interest in events and proportion of participants showing acceptance of persons conducting events (activities)
People Involement
Number of participants in various events (activities)
Psychological & socioeconomic characteristics of target audience
Continuity, frequency, and intensity of face-to-face or mediated interaction between target audience and project staff
Activities
Planned strategies in collecting and preparing educational materials
Transmitting subject matter content through mass media, meetings, and other events
Publicizing programs
Inputs
Plans to utilize kinds and amounts of resources to activities
OBJECTIVES
Evidence

*Analyzing Impacts of Extension Programs, Washington, D.C.: USDA, 1976 (Publication ESC-575).

implementation process, and increase the cost of program offerings. If inconsistency or discrepency is found among program goals and objectives, immediate feedback must be provided to the project director as well as to the staff members.

In our own project, analysis of goals and objectives was carried out by a team including the evaluator, the project director, and one to two other staff members. Lengthy deliberation was usually given to each major goal and objective at the very beginning of the project. We found that it was essential for all parties concerned to come to an agreement on the interpretation of a goal or objective statement before it can be operationalized into action.

Like most Extension programs, our community outreach programs have, explicitly or implicitly, objectives at almost all levels of the hierarchy, as depicted in Figure 2. A selected list of our program objectives with indication of their hierarchical levels are presented on the next page as an illustration of the wide range of objectives included in a community outreach program.

Step Two - Translate goals and objectives into measurable indicators (evidence) of levels of achievement.

There are many factors which enter into value judgments of programs. Generally, the more nearly the objectives of a program are reached, the more positive the judgment of the program, i.e., the higher the value assigned to the program.

As outlined and illustrated in the previous step, most community-based programs have objectives at several or all levels of the hierarchy depicted in Figure 1. Usually, evidence of program impact in the form of achievement indicators becomes stronger as one goes up the hierarchy. Indicators (evidence) at the two lowest levels; namely, "Inputs" and "Activities," provide little or no measure of the extent to which target audience benefits from the program. Indicators (evidence) at the "People Involved" level may suggest the extent to which some kinds of benefits are being received by participants. However, evidence at this level, such as participation rate, does not necessarily indicate progress toward ultimate program objectives. A high participation rate may occur for some reason unrelated to the benefits intended to accrue from the program.

Figure 2

SELECTED COMMUNITY OUTREACH PROGRAM OBJECTIVES
AS EXAMPLES IN VARIOUS HIERARCHICAL LEVELS

Hierarchical Level	Objective Statement*
End Results and Activities	"To raise the level of living for individuals and families in three Middlesex County communities (and vicinity) while developing an educational package in family resource management for Extension professionals."
People Involvement, KASA Change, and Practice Change	"Low and middle-income families in the three communities in Middlesex County will learn and use skills to develop a personal money management plan recognizing that periodic revision is required due to changes in the life cycle."
Inputs and Activities People Involvement	"The community outreach phase will utilize a mobile van, community meeting rooms, and other locations. Mini-lessons will be given and courses will be held at religious centers, at industrial sites, as well as in homes bringing valuable information concerning budgeting, credit, insurance, and saving to those who wish to participate."

*Quoted from the original funded proposal of our outreach project.

Evidence at the "Reactions" level can start to provide better indication of whether given activities are helpful as intended. However, such evidence indicates less satisfactorily than evidence of KASA changes the extent of progress toward ultimate program objectives. Knowledge, attitudes, skills, and aspirations to be acquired are often considered as merely preliminary steps to adoption of more desirable patterns of behavior, though there are differing philosophies on whether practice change is essential to successful Extension and community-based education (Steele, 1972).

Practice change assessment is considered desirable by many education evaluators when program objectives involve indicators such as: (1) expression of changed attitudes; (2) utilization or application of new knowledge and/or skills; and (3) follow-through on new aspirations, decisions, or commitments.

Assessing practice change is, however, quite different from assessing accomplishment of ultimate program objectives. Extension workers are often held accountable for the extent to which their programs are contributing to the solution of overall problems of their target population or the society in which they serve. Hence, rigorous evaluation of the impact of most community-based Extension programs would probably be in terms of whether desired end results are achieved, including assessment of any significant side effects.

Usually, the strength and rigor of program evaluations can be enhanced by assessing at as many and as high levels of the hierarchy as possible. But the difficulty and cost of obtaining evidence on program accomplishments tend to also increase when the number of assessment levels is greater and the hierarchy of program objectives is ascended.

The most important task at this point of the program evaluation process is, therefore, to delineate a set of acceptable indicators closely reflecting the level of accomplishment that is desired for each program objective. Such indicators become the basis upon which devices and strategies for collecting evaluative information (evidence) can be designed and developed. These indicators usually reflect the objectives of and learning expectancies for each of the major topic areas. In addition, they provide a guide to insure that the presentation of the topics is consistent with the objectives.

The delineation of indicators for each topic area is an involved and systematized process that involves six sequential tasks:

Task One - Defining the hierarchical levels of specific objectives for the topic area consistent with the needs of the communities, goals of the project, and time limitations of the sessions.

Task Two - Developing content outlines of the subject matter based on the objectives defined.

These first two tasks are carried out by the project director, program assistant, and/or subject matter specialists.

Task Three - Drafting a suggested list of indicators relative to the objectives and content outlines.

Since the indicators are used by the project staff as a guide and by the evaluation staff as a basis for determining if the clientele acquired competence and practice change, the drafting is done jointly by the project director, program assistant, and evaluator, and/or the evaluator's assistant.

Task Four - Modifying and revising the draft as input, comment, and suggestions are made by members of the staff.

Task Five - Delineating topic indicators by consensus at a joint staff meeting.

Task Six - Testing and refining indicators in light of their use by the project and evaluation staffs, taking into account clientele feedback. This procedure allows for the benefits of experience to be incorporated into the project.

Through the use of the above process, five sets of indicators were delineated in the content areas of: (1) credit, (2) budgeting, (3) saving and investing, (4) life insurance, and (5) housing. A copy of the six indicators for the topic on budgeting is given as an example on the next page. Notice that the desired hierarchical level of attainment is "Practice Change" on this set of indicators.

Furthermore, the project and evaluation staffs have intentionally developed all six indicators on this topic as criteria for the assessment of KASA changes rather than for the evaluation of program activities. This was done due to the fact that each topic area was usually presented by different individuals in a variety of settings for various types of audiences. There was a felt need to allow the flexibility to accommodate and encourage a wide possible range of instructional strategies to be used.

INDICATORS FOR THE TOPIC: BUDGETING

The following six indicators have been identified for the topic on budgeting. At the end of a session on budgeting, the participant will be able to:

1. define a budget plan as a workable guideline for spending which varies from person to person.

2. explain that the purpose of setting up a budget plan is to meet individual and/or family goals and needs.

3. identify the important factors in setting up and in modifying a budget plan which are:

   - income

   - debt

   - family size and composition

   - value system (goals, objectives, priorities)

4. identify the key elements of a budget plan which are:

   - income(s)

   - expenditures (fixed and flexible)

- saving and investment

5. name the steps of setting up a budget plan including:

   (1) identifying take-home incomes,

   (2) identifying obligations,

   (3) computing expendable income,

   (4) budgeting expenditures in each area of needs,

   (5) keeping record of spending,

   (6) comparing actual expenses with allotted amount, and

   (7) adjusting the budget plan based on changing situations in the family.

6. apply knowledge in setting up a budget plan by using a case situation provided by the presenter.

Step Three - Collect data on the indicators for participants.

Evidence of accomplishment of objectives may vary in quality. The range in quality of evidence is often referred to as "hard" or "objective" versus "soft" or "subjective" data. Data are "hard" to the extent that they are valid, representative, and quantified (Sjogren, 1970). One must realize that so-called "hard" and "soft" data constitute a continuum; a dichotomy is depicted simply for the sake of convenience. Hard data are usually ideal and preferred; however, they are usually more expensive and difficult to obtain. Hence, they should be collected only when the benefits to decision-making anticipated from superior evidence clearly outweigh the costs of obtaining such evidence.

There are many situations especially in the context of community outreach programs where "soft" data are all that can be obtained. For example, program participants, and particularly nonparticipants, are often unwilling or unable to be observed or to respond to instruments which require detailed answers and extensive time for completion.

Be careful about the validity of the data gathered. For example, awareness of program evaluation by participants may cause them to act or speak the way they think they are expected rather than naturally. Data invalidity may also result from faulty instruments, from observing too small a range of actions, and/or from perceiving participants' actions inaccurately due to personal bias.

In addition to validity, the preciseness of the data in providing an adequate picture of the participants is also critical. Thus, it is important to obtain quantitative data capable of describing and indicating rather precisely the degree of difference, commonality, or relationship between and among program offerings, clientele groups, individuals, or structures that are being observed.

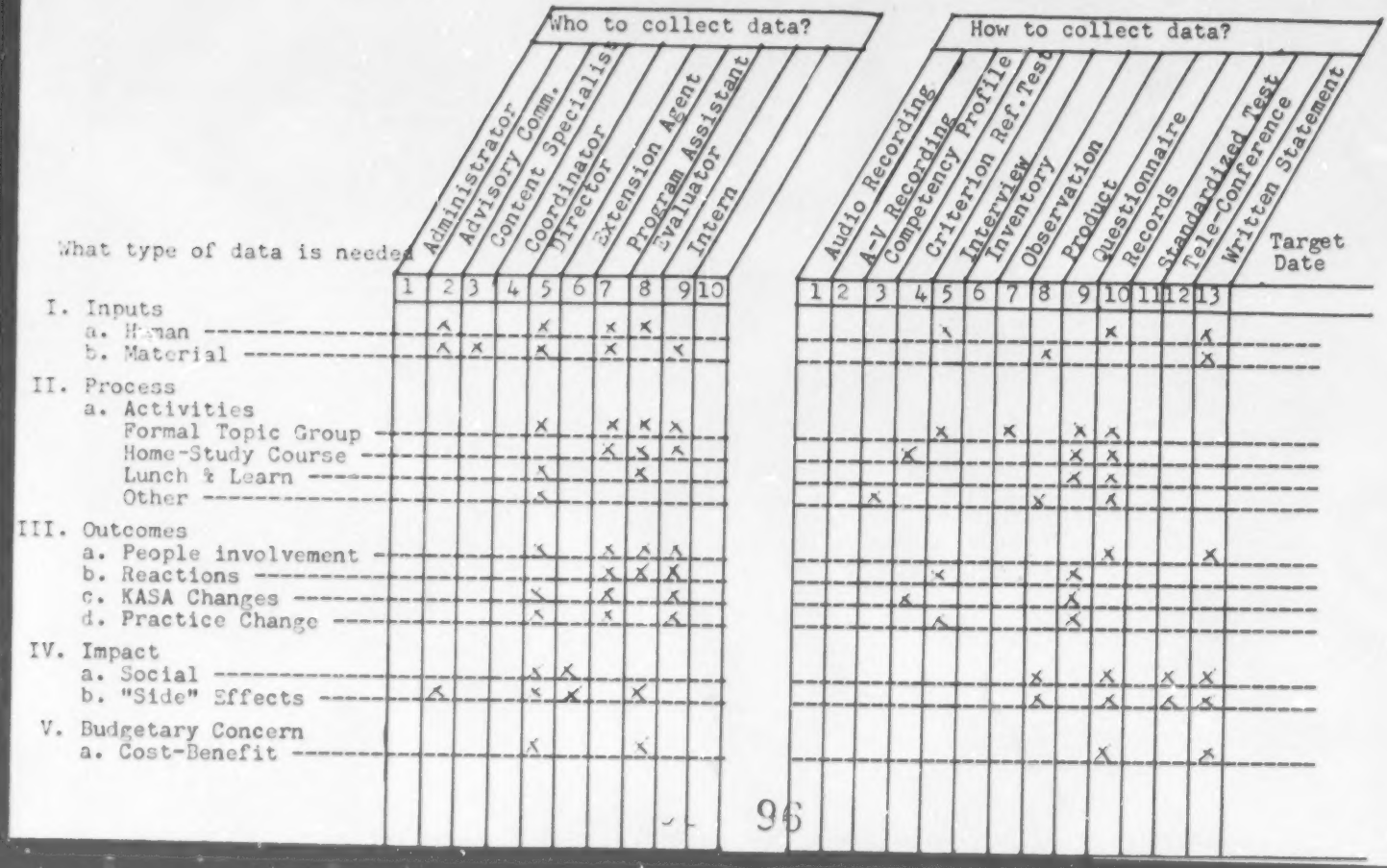
Representativeness is a third area of concern regarding data quality. Representativeness is the extent to which observations concerning individuals, groups, or situations under study apply to a total population of individuals or groups. It can be achieved through taking a census of the population or taking a representative sample from the population (Kish, 1953). In the case of community outreach programs, it is difficult to achieve high degree of representation when data are collected. This is due mainly to the fact that participants attend programs on a voluntary and on-and-off basis.

Data collection planning requires four types of decisions: (1) What type of data is needed? (2) Who will collect the data? (3) How to collect the data? and (4) When to collect the data?

In our project, a worksheet was used to plan our data collection strategies and means for the entire project. The evaluator first prepared a tentative plan ahead of time, using the worksheet provided on the next page. This plan was presented to and discussed by the entire staff during one of the evaluation meetings. Thereafter, the plan was revised and used as a guide for furthering most, if not all, the evaluative efforts in the project.

As soon as a data collection plan is made, appropriate data collection devices and strategies need to be selected or developed for each type of data needed. Numerous kinds of information gathering techniques are available from which one can select as means to collect evaluation data. Whether the devices are selected or developed, four criteria should be used: (1) validity, (2) reliability, (3) objectivity, and (4) feasibility.

COMMUNITY OUTREACH PROGRAM DATA COLLECTION PLANNING SHEET



The validity of a data collection device is most important. Without validity, it is almost worthless. The level of reliability of a data collection instrument can usually be determined through statistical analysis (Thorndike and Hagan, 1961). In reality, the degree of validity, reliability, and objectivity of any set of data collected depends highly upon the trade-offs between ideal measurements for the evaluation purpose at hand and the feasibility of the data collection strategies and devices to be used.

In our project, we have found that early timing in planning allows the project and evaluation staffs to make informed and systematized rather than hasty, last-minute decisions. Like any other steps of program evaluation, sufficient time is essential to have the job done well. Following is a variety of data collection instruments developed and used in our project together with their administration strategies:

PARTICIPANT RECORD FORM*

NAME: _____ PHONE: _____
Please Print

MAILING
ADDRESS: _____

_____ ZIP: _____

PLACE: _____ DATE: _____

TOPIC: (Please check)

_____ Credit

_____ Saving/Investment

_____ Budgeting/Family Communication

_____ Insurance

_____ Housing

*This form is completed by the clientele and is designed to collect data as a basis for conducting process (activity) and product (number and type of clientele) evaluation. It provides a means for obtaining the clientele sample for product (outcome - KASA change) and impact evaluation.

QUESTIONNAIRE

This device, completed by participants, is for the purpose of collecting data for evaluating process (presentation of information and materials) and product (clientele reactions).

To the project staff, this questionnaire provides continuous participant feedback which reinforces the existing strategy and/or suggests changes for improvement.

CONSUMER PROTECTION LAWS QUESTIONNAIRE

This questionnaire, completed by participants, is designed to collect data for evaluating process (presentation of information and materials) and products (outcomes - KASA change and reactions). It has been used specifically with senior citizen groups.

The questionnaire also provides participant feedback to the project staff which reinforces the existing strategy and/or suggests need for program improvement.

INSTALLMENT LOAN WORKSHEET

The worksheet, completed by participants as an exercise during the presentation, gives evidence of product (KASA change) evaluation.

For Office Use

Topic: _____

Date: _____

Place: _____

Presenter(s) _____

_____

_____

QUESTIONNAIRE

1. Circle the number below that best describes the session in relation to your expectations about it:

   1 2 3 4 5 6 7 8 9

   Bad Good

2. Would you recommend this session to your friends?

   ___ Yes ___ No

3. List what you liked and didn't like about the session.

   I liked: _____

   _____

   _____

   I didn't like: _____

   _____

   _____

4. What suggestions do you have for the improvement of the session?

   _____

   _____

   _____

   _____

5. Would you like to attend further sessions on:

   ___Credit ___Life Insurance

   ___Housing ___Saving and Investing

   ___Budgeting ___Other (suggested topic)

   _____

THANK YOU

For Office Use

Topic: Consmr. Prot. Laws

Date: _____

QUESTIONNAIRE

Place: _____

Presenter: _____

This session was about your rights in dealing with door-to-door selling, products mailed to you that you did not order, and product warranties. To help improve our service, please answer any or all of the questions below.

Circle the number below which tells how you feel about the session:

Nothing A lot

1. How much did you learn? 1 2 3 4 5 6 7 8 9 10

Not helpful Very helpful

2. Was the session helpful? 1 2 3 4 5 6 7 8 9 10

3. Would you recommend the session to your friends?

Yes_____ No_____

4. Please tell what you liked or didn't like about the session.

_____

_____

_____

$3000.00 Installment Loan

APR_____

a) Amount to be financed _____

b) Finance charge _____

c) Total payment _____

d) Annual percent rate (APR) _____

e) Payment schedule _____

_____ Monthly payments of _____

102

SESSION EVALUATION

This form is completed by a member of the evaluation staff or a nonparticipant observer at a session. To the evaluation staff, this provides data on process (service delivery system, presentation of information, use of relevant materials, feedback to the project staff) and product (recipient profile) evaluation.

The importance of having this type of information became apparent to the assistant evaluator after observing several sessions. No two sessions even on the same topic are exactly the same since the presentation is geared to the characteristics and needs of the clientele group. Thus the evaluation staff needed to have a record of the items discussed and the approximate time spent on each so that the follow-up interview questions would correspond to the presentation. Further, it is valuable for the evaluator to know whether the clientele from a particular group could be used as part of the follow-up interview evaluation. The use of the form to evaluate the presentation provides another avenue for communication and feedback between the two staffs.

SESSION EVALUATION

I. Items Discussed — Time

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Topic: _____

Date: _____

Presenter: _____

Place: _____

Contact: _____

Participants: _____

Evaluator: _____

II. Handouts Used

Participation Form _____

Questionnaire _____

_____

_____

_____

_____

_____

III. EVALUATION

	Poor					Good		Not App.	Comments
Rapport	1	2	3	4	5	6	7	8	_____
Time Management	1	2	3	4	5	6	7	8	_____
Use of Handouts	1	2	3	4	5	6	7	8	_____
Motivates Audience	1	2	3	4	5	6	7	8	_____
Appropriate Material	1	2	3	4	5	6	7	8	_____
Effective Presentation	1	2	3	4	5	6	7	8	_____
IV. Audience for Feedback	1	2	3	4	5	6	7	8	_____

V. Other Comments and Suggestions

VI. Record examples of questions asked on back.

CONSUMER INFORMATION CHECKLIST

This checklist, completed by the clientele, allows the collection of data for product (quality and use of materials) evaluation.

Previously discussed forms dealt with the presentation of sessions outreach phase of the project. Another phase of outreach is the use of a mobile van, "$'s Mobile." The van serves three target communities, dispensing information and materials.

This checklist is designed specifically for those who obtain materials by visiting the van. The form provides inventory data as well as evaluation material to the project staff.

W E L C O M E T O $ M O B I L E

Consumer Information Checklist

To help improve our service, please circle the appropriate numbers which best indicate your feeling or experience about the materials you have selected.

MATERIAL	BAD						GOOD	DID NOT READ
Understanding Life Insurance (383).	1	2	3	4	5	6	7	8
How Much Am I Worth? (476-A). . . .	1	2	3	4	5	6	7	8
Programming My $'s (477).	1	2	3	4	5	6	7	8
What About Car Insurance? (480) . .	1	2	3	4	5	6	7	8
Car Loans (481)	1	2	3	4	5	6	7	8
Buying A Car (482).	1	2	3	4	5	6	7	8
Dollars & Cents of Buying A House (486-A).	1	2	3	4	5	6	7	8
ABC's of Mortgage Loans & Insurance (488-A)	1	2	3	4	5	6	7	8
Money Matters - Women and Credit (487-A)	1	2	3	4	5	6	7	8
Money Matters - Your Credit Rights (489).	1	2	3	4	5	6	7	8
Money Matters - When You Lose Your Job (521)	1	2	3	4	5	6	7	8
Protection Through Life Insurance .	1	2	3	4	5	6	7	8
Food & Nutrition.	1	2	3	4	5	6	7	8
Extension Home Economics.	1	2	3	4	5	6	7	8

The following information would be greatly appreciated:

NAME: _____ DATE: _____

ADDRESS: _____ PHONE: _____

_____ ZIP: _____

All of the aforementioned instruments for data collection benefit both the evaluation staff and the project staff. Having the instruments meet the needs of both staffs was a prime consideration. The process for their design and development followed procedures similar to the ones described for the delineation of indicators. No instrument was used until the project director, coordinator, evaluator, and assistant evaluator agreed to its design. If after using an instrument, a staff member felt that it was not meeting the objectives or detected any other problems with its use, changes and improvements were suggested and again agreed upon by general consensus.

To foster communication between the evaluation staff and the project staff, various channels are utilized:

1. The project director and evaluator meet regularly on a monthly basis.

2. The project director, evaluator, coordinator, and assistant evaluator meet monthly, generally after the director-evaluator meeting.

3. The evaluator and assistant evaluator meet on a weekly basis.

4. The project coordinator and/or director meet with the assistant evaluator weekly.

5. Other meetings between any members of the two staffs are held whenever necessary.

6. Memos and letters are used as needed.

7. Telephone communication is frequent.

8. The data collection instruments are filed and available to all members of each staff.

Step Four - Analyze and interpret evaluation results.

Step Five - Make and present evaluative judgment and recommendations.

These two steps of the program evaluation process are discussed together briefly in this section due to two factors: (1) they are almost inseparable in practice, (2) they are highly technical and can not be covered sufficiently in this manual. Therefore, only general guidelines are provided.

The main purpose for analyzing and interpreting evaluation results is to detect possible relationships, trends, uniqueness, commonalities among program offerings, clientele groups, and/or individual participants. Generally speaking, descriptive statistics (range, mean, mode,...etc.) are the most appropriate way to organize and simplify raw data into a manageable and meaningful condition (Rosenberg, 1968). Inferential statistics, such as hypothesis testing, are necessary only if scientific inferences need to be drawn (Winer, 1962).

Evaluations of program effectiveness are utilized most fully if their implications for decision making are noted explicitly. Presentation of evaluation results, therefore, needs to include alternatives and recommendations for future program development. Furthermore, interpretation of evaluation findings for decision making should include appraisals of the quality and completeness of the evaluation study.

The collection, analysis, and use of evidence in judging the degree of program effectiveness should itself be assessed for effectiveness. If the acquisition and use of evidence on program impact is viewed as an "activity" through "inputs," then at least two questions, based on the hierarchy for evaluation presented in this chapter, need to be asked. These two questions are: (1) What has been learned by the collection and analysis of data, in relation to the degree of expected improvement in knowledge about program effectiveness? (2) Have program decisions been influenced by knowledge of program effectiveness acquired through evaluation studies?

Finally, appraisals of evaluation studies can suggest needs for further program evaluation, or related analyses, to assist in specific decision issues within the broad context of program development.

Summary and Conclusions

The major purpose of evaluation is to assist in program decision making. Formal evaluations are worth doing only if they have a chance of affecting such decisions.

This chapter presents information and options relative to: (1) functions of program evaluation, (2) obstacles of program evaluation, (3) factors affecting program evaluation, and (4) process of evaluating community-based educational programs. Examples from a federal-funded community outreach project are provided to illustrate major points being made.

It was found through reading and practice in the field that adequate judgments of program value and sound program planning decisions can be made only by comparing clear criteria and sufficient evidence regarding program accomplishments.

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111

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117